



Required by Wis. Stat. §§ 43.17(5) and 43.24(3)

GENERAL INFORMATION

Library System

Monarch Library System

Describe significant needs and problems that influenced the development of this and other system plans.

Monarch Library System (MLS) continues to strengthen relationships, protocols, and policy as a recently established system. The system experienced an unanticipated managerial gap for six months this past year, which was resolved by the hiring of an interim director for a one year period. The focus for 2020 is tightening up internal workflows and formalizing processes to improve and stabilize our service model.

Did the library system consult member libraries in the development of this plan?

- No, the library system did not include member libraries in the development of this plan.
- Yes, the library system included member libraries in the development of this plan.

If yes, describe the planning environment and process for this system plan. Include how member libraries are involved in plan development and review:

Member libraries have provided input via the directors' council on the system's approach to e-content and digital collection support, technology support and infrastructure, and our overall approach to improving communications and workflows.

Does the library system have a formally appointed advisory committee under Wis. Stat. § 43.17(2m)?

- No, the library system does not have a formally appointed advisory committee.
- Yes, the library system has a formally appointed advisory committee.

If the system appoints an advisory committee under Wis. Stat. § 43.17(2m), describe how the system makes appointments, posts meetings, and how the advisory committee reports to the library system board. Include a list of any additional system planning documents with the period covered and attach any planning documents which have not previously been provided to the Division:

Our member libraries have a directors council which is organized by its own members, pursuant to its own charter and not created by a directive from our Monarch Library System board. The directors council is not appointed by the system board, nor do they formally report to the Monarch Library System board. They do provide an update at board meetings to inform the board of any significant activity resulting from their collective work.

ASSURANCES

The following plan and compliance document provides assurance that your public library system intends to comply with all statutory requirements for public library systems for calendar year 2020. Indicate, with a check, your system's intent to comply with each system requirement and provide the requested information under each system requirement.

Wis. Stat. § 43.24(2) For a public library system to qualify for and maintain its eligibility for state aid under this section it shall ensure that all of the following are provided:

Membership Agreements

- Wis. Stat. § 43.24(2)(a) Written agreements that comply with Wis. Stat. § 43.15(4)(c)4 with all member libraries.
- The system will provide a sample copy of the agreement with a list of all members signing and the dates signed to the Division by January 15. (The system does not need to file multiple copies of the same agreement; only a sample copy of each type of agreement is necessary.)

If the system is providing the sample copy and list of members signing through a publicly available webpage, provide the URL here:

Resource Library Agreement

- Wis. Stat. § 43.24(2)(b) Backup reference, information and interlibrary loan services from the system resource library, including the development of and access to specialized collections, as evidenced by a written agreement with that library.
- The system will provide a signed copy of the resource library agreement to the Division by January 15.

If the system is providing the resource library agreement through a publicly available webpage, provide the URL here:

ASSURANCES (cont'd)

Reference Referral, Interlibrary Loan, and Technology

- Wis. Stat. § 43.24(2)(d) Referral or routing of reference and interlibrary loan requests from libraries within the system to libraries within and outside the system.

List ongoing activities related to this requirement:

1. Member libraries use WISCAT, funded by MLS, for interlibrary loan outside of the system and the shared Integrated Library System (ILS) for in-system intralibrary loan.
2. Provide in-system delivery service (5 days/week) by system trucks for transportation of materials, and contract with South Central Library System for 4 days/week statewide delivery service.
3. Serve as intermediary and facilitate communication between Resources for Libraries and Lifelong Learning staff and member libraries.
4. Participate in all RL&LL meetings and share information with member libraries.
5. Monitor the holds queue along with the ILS committee to assist with balance between net borrowers and lenders.
6. Provide specialized, back-up reference services as needed, via the resource library.

Indicate new or priority activities relating to this requirement for the plan year (if none, indicate so):

Inservice Training

- Wis. Stat. § 43.24(2)(e) Inservice training for participating public library personnel and trustees.

The Division interprets inservice training to incorporate a range of in-person and virtual continuing education opportunities.

List ongoing activities related to this requirement:

1. MLS continues to participate as an active member in the Southeast Wisconsin Consortia (SEWI) for continuing education for library personnel and board members. We continue to explore opportunities to expand upon in-demand SEWI programming within our system boundaries to increase access.
2. Host 2-3 youth services meet-ups and idea sharing workshops with YS and teen staff throughout the system.
3. Technology training geared toward smaller library directors and staff.
4. Continue to expand on-demand educational resources in our Monarch Connect & Share Sharepoint platform.
5. Conducting small workshops, cohort-style, to review new public library standards and engage in assessment.

Indicate new or priority activities relating to this requirement for the plan year (if none, indicate so):

1. Increase programming geared toward teen services.
2. Monarch Connect & Share expansion (Sharepoint site to house tutorials and documents around continuing education and idea sharing)
3. Expand standards workshops to additional cohorts, eventually touching all 31 public libraries in our system.

Identify the names and email addresses of continuing education staff employed by the system for continuing education services:

None beyond system director.

If the system contracts with another system or entity to plan and conduct continuing education services, list that system or entity and provide a link to, or copy of, the current agreement:

Southeast Wisconsin Consortia, <https://sewilibraries.org/>

Delivery and Communication

- Wis. Stat. § 43.24 (2)(fm) Electronic delivery of information and physical delivery of library materials to participating libraries.

List ongoing activities related to this requirement. For physical delivery reference resources, personnel, and vendors.

Delivery is provided five days/week by our own delivery staff. The system operates three delivery trucks and routes, one out of our Sheboygan location, and the other two routes originate from our West Bend hub. SCLS materials are incorporated with the current delivery system.

Indicate new or priority activities relating to this requirement for the plan year (if none, indicate so):

None

ASSURANCES (cont'd)

Service Agreements

- Wis. Stat. § 43.24(2)(g) Service agreements with all adjacent library systems.
- The system will provide a copy of the agreements to the Division by January 15. The agreements with adjacent systems – including consulting agreements, consortium agreements, etc. – must include a list of all systems signing the agreement.

If the system is providing the service agreements through a publicly available webpage, provide the URL here:

If the system is providing the service agreements through a publicly available webpage, provide a brief description of the types and number of agreements here:

Other Types of Libraries

- Wis. Stat. § 43.24(2)(L) Cooperation and continuous planning with other types of libraries in the system area, which results in agreements with those libraries for the appropriate sharing of library resources to benefit the clientele of all libraries in the system area.
- The system will have agreements with other types of libraries, or if the system participates in a cooperation agreement with a multitype organization to meet the purposes of this goal, there is established a clear link between the system and the individual members of the multitype organization. The system will provide a copy of the agreement with a list of all signing libraries to the Division by January 15.

If the system is providing the agreements with other types of libraries through a publicly available webpage, provide the URL here:

If the system is providing the agreements with other types of libraries through a publicly available webpage, provide a brief description of the types and number of agreements here:

Library Technology and Resource Sharing Plan

- Wis. Stat. § 43.24(2)(m) Planning with the division and with participating public libraries and other types of libraries in the area in regard to library technology and the sharing of resources. By January 1, 2000, and every fifth January 1 thereafter, the public library system shall submit to the division a written plan for library technology and the sharing of resources.
- The system will provide the current plan for library technology and resource sharing to the Division by January 1, 2020. See [the Library System Technology and Resource Sharing plan webpage](#) for more information.

If the system is providing the current technology and resource sharing plan through a publicly available webpage, provide the URL here:

Is the plan current and comprehensive for the technology and resource sharing services the system provides?

- Yes, the library system technology and resource sharing plan is current and comprehensive for the technology and resource sharing services the system provides.
- No, the library system technology and resource sharing plan is not current or comprehensive for the technology and resource sharing services the system provides or will provide.

If no, describe what the system has added, changed, or eliminated from the plan in effect (and describe how the changes were reviewed with member libraries and approved by the system board):

Indicate new or priority activities relating to this requirement for the plan year:

1. Install standardized network equipment at all member libraries including router, switch, and access points to allow for more efficient and responsive network and ILS support.
 2. Digitization kits - provide training documentation and circulation of two new digitization kits acquired through the statewide consortium.
 3. Upgrade virtual reality equipment, 3D printer, and laptop lab as part of circulating makerspace collection.
 4. Monarch Connect & Share - Continue to expand resources and utilization of system-wide Sharepoint site.
 5. Maintain technical IT support for ILS.
 6. Pursue statewide consortia backup environment.
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ASSURANCES (cont'd)

Professional Consultation

- Wis. Stat. § 43.24(2)(h) Professional consultant services to participating public libraries.

Identify consultants, specific service areas, and related activities. If the consultant is employed by a member library, indicate the library and the consultant's title:

Jennifer Chamberlain, interim director - CE, inclusive services, library administration, annual reports, standards compliance, finances and budget, board issues and appointments, policies, strategic planning, HR, contracts, county planning, county funding and reimbursements, library building/expansion projects, statutes, library tax exemptions, library director recruitments, and library personnel issues.

Alison Hoffmann, Database Management Librarian & ILS Administrator - Polaris ILS-related issues and planning, ILS statistics and reporting, Monarch catalog, circulation, serials, acquisitions, cataloging, authority records, bibliographic records, technical processing and workflows, digitization and digital collections, and interlibrary loan.

Robert Nitsch, IT Manager - planning, development, introduction, implementation and evaluation of information technology that supports member library operations and service delivery; new technologies including makerspace equipment; technology projects with local municipalities.

Heather Fischer, Public Information Specialist - resource and event marketing materials including print and digital, design and printing services support

Kim Niesing (Plymouth Public Library) Youth Services Liaison - youth services -- birth through teen, contact and support liaison for Monarch youth services librarians, encouraging professional development and communication among all youth services librarians in the system. Summer Library Program support.

Indicate new or priority activities relating to this requirement for the plan year (if no change from current year, indicate None):

None

Inclusive Services

- Wis. Stat. § 43.24(2)(k) Promotion and facilitation of library service to users with special needs.

The Division interprets services to users with special needs as inclusive services. Inclusive library services are holistic, spanning library policies, collections, space, and services. Inclusive services reflect equity and accessibility for all members of the community, including services to individuals or groups for whom using the public library is difficult, limited, or minimized.

Indicate new or priority activities relating to this requirement for the plan year:

1. Hold discussions during directors council related to the new Inclusive Services Assessment guide.
 2. Consider holding cohort-style workshops around inclusive services assessment, in a similar fashion to the public library standard project.
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Other Service Programs

Wis. Stat. § 43.24(2)(l) Any other service programs designed to meet the needs of participating public libraries and the residents of the system area, as determined by the public library system board after consultation with participating public libraries.

List each "other" service program individually with ongoing activities and new or priority activities for the plan year under each program. For instance, if the system provides a bookmobile service program, list ongoing activities and new or priority activities for the bookmobile program. (Do not lump miscellaneous activities under a single "other" program.)

Bookmobile for Sheboygan and Ozaukee Counties

Ongoing activities

1. Partner with local schools, day care centers, assisted living facilities and non-librariad communities to provide access to materials and programming.
2. Utilize Facebook account established in 2019 to expand reach and access. Explore opportunities for additional communication methods with patrons.
3. Run summer reading program with reading logs, incentives, craft activities and other special events for non-librariad community youth.
4. Ongoing evaluation of locations/stops to maximize service.

New/priority activities:

1. Explore opportunities for additional communication methods with patrons
 2. Expand information available on MLS website including photos and video tour.
 3. Increase outreach services at community events such as local festivals for pop-up bookmobile programming.
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ASSURANCES (cont'd)

Database management services**Ongoing Activities**

1. Contract with OCLC for a Cataloging Subscription, providing member libraries with access to the OCLC cataloging database and services.
2. Provide member libraries with a centralized database management service. This includes cleanup, standardization, maintenance, enrichment, authority control, and original cataloging to enhance access to and the quality of information in the Integrated Library System (ILS) database. It also includes maintenance of the accuracy of member libraries' holdings displayed in WISCAT, the local catalog currently known as Monarch Catalog, and Worldcat.
3. Continue support of digitization program and projects for member libraries.

New/priority activities:

1. Implement pilot project to provide access to OCLC WebDewey tool for member libraries.
2. Investigate enhancement of the public face of the digitization program and additional options to support library interest in digitization projects.

Shared Integrated Library Automation Service**Ongoing activities**

1. The system coordinates and operates the shared library automation system on behalf of its member libraries, the system bookmobile, and Lakeland University. The services are carried out according to the policies and procedures created by the ILS and Circulation Committees and Directors Council, which are made up of members from participating agencies.
2. Services provided include, but are not limited to: technical support of the ILS, training and support for member library staff on the ILS, customization of the web catalog currently known as Monarch Catalog, researching new services, maintaining a good working relationship with the ILS vendor, providing monthly/yearly reports for libraries as well as on demand reports, providing creation of custom reports, serving as liaison and providing support to the above committees, and overall working with and engaging participation of member library staff to investigate and improve the use of the ILS and Monarch Catalog, both for staff and the public.

New/priority activities:

1. Continue to increase ILS and Monarch Catalog documentation for use by member library staff.

Public Information**Ongoing activities:**

1. Develop customizable marketing materials for the summer reading program.
2. Provide marketing and promotional materials for e-content (digital) collections coordinated by system.
3. Organize and market two system-side public events for patrons of member libraries on behalf of MLS.
4. Organize annual system-wide trustee event.
5. New in 2019, provide support for Monarch-sponsored booth at all four county fairs including a mobile kiosk for patrons to test out new digital content and the online catalog.

New/priority activities:

1. Develop system-wide marketing and communications plan.
2. Expand public event support by developing a community festival tool-kit including pop-up tent, table cloth, banners, etc.
3. Develop stylized system map with locations of all MLS libraries.

Administration

- The system will not expend more than 20 percent of state aid received in the plan year for administration.
 - The system will submit the 2019 system audit to the Division no later than September 30, 2020.
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ASSURANCES (cont'd)

Budget

The system completed and included the budget by service program category and fund source for the plan year ([see guidelines](#)).

COLLABORATIVE ACTIVITIES

Summary of Activities Briefly describe collaborative activities with other libraries, public library systems, and other organizations. Exclude services and activities listed in the system's 2020 resource library contract.


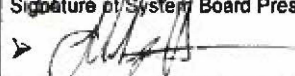
Monarch Library System continues to collaborate with Wisconsin systems for CE training. MLS works closely with our member libraries to provide an exceptional ILS to patrons in the four county region. MLS supports the member share (platform fee) for WPLC Overdrive collection, while the member libraries pay for the content. MLS is also participating in the statewide back-up collaborative for server back-up and digital collections.

Cost Benefit For each activity above, list the activity name and estimated cost benefit realized.

Activity	Amount
1. Southeast Wisconsin Continuing Education (SEWT)	\$13,000
2. ILS Polaris	\$300,000
3. Trustee Training w/ SCLS	\$1,000
4. Delivery with SCLS	\$120,000
5. Wild Winter Wisconsin Webinar series (CE)	\$500
6. WPLC/Overdrive	\$1,207,500
7. RB Digital e-journal content w/ Manitowoc/Calumet Library System	\$16,000
8. Collaborative Back-up project	\$35,000
9. Gale courses	\$30,000
10.	
Cost Benefit Total	\$1,693,000

CERTIFICATION

WE, THE UNDERSIGNED, CERTIFY that to the best of our knowledge, the information provided in this document and any attachments is true and correct, and that the system will be in full compliance with all applicable provisions of Chapter 43 of the Wisconsin Statutes for the year 2020.

Name of System Director Jennifer Chamberlain, Interim	Signature of System Director 	Date Signed Mo./Day/Yr. 9/30/2019
Name of System Board President Mark Hanson	Signature of System Board President 	Date Signed Mo./Day/Yr. 09/30/2019

**FOR DPI USE
LIBRARY SYSTEM PLAN APPROVAL**

Pursuant to Wis. Statutes, the plan contained herein is: <input checked="" type="checkbox"/> Approved <input type="checkbox"/> Provisionally Approved See Comments. <input type="checkbox"/> Not Approved See Comments.	DLT Assistant Superintendent Signature 	Date Signed Mo./Day/Yr. 11/1/2019
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Comments

PUBLIC LIBRARY SYSTEM 2020 ANNUAL PROGRAM BUDGET					
Program	2020 Public Library System Aid	System Aid Carryover and Interest Earned	Other State and Federal Library Program Funds	All Other Income	Total
Technology, Reference, and Interlibrary Loan*					
1. Technology	\$186,320			\$20,000	
2. Reference & ILL	\$37,146				
3. ILS	\$137,800			\$175,097	
4.					
5. Electronic Resources	\$61,248			\$157,529	
Program Total	\$422,514	\$0	\$0	\$352,626	\$775,140
Continuing Education and Consulting Service*					
1. CE & Consulting	\$18,341				
2. Resource Library	\$112,949				
Program Total	\$131,290	\$0	\$0	\$0	\$131,290
Delivery Services	\$238,695				\$238,695
Library Services to Special Users	\$12,474				\$12,474
Library Collection Development					\$0
Direct Payment to Members for Nonresident Access			\$1,852,297		\$1,852,297
Direct Nonresident Access Payments Across System Borders			\$73,250		\$73,250
Library Services to Youth	\$12,473				\$12,473
Public Information	\$108,565				\$108,565
Administration	\$139,217				\$139,217
Subtotal	\$511,424	\$0	\$1,925,547	\$0	\$2,436,971
Other System Programs					
1. Database Management	\$75,786				\$75,786
2. Bookmobile			\$275,164		\$275,164
Program Total	\$75,786	\$0	\$275,164	\$0	\$350,950
Grand Totals	\$1,141,014	\$0	\$2,200,711	\$352,626	\$3,694,351

* These programs may be divided into subprograms at the discretion of the system. If choosing not to use subprograms, enter amounts on line 1. Line 5 is reserved for the amounts budgeted for electronic resources (see program budget guidelines).