Wisconsin Department of Public Instruction
**PUBLIC LIBRARY SYSTEM PLAN AND
CERTIFICATION OF INTENT TO COMPLY
CALENDAR YEAR 2020**
PI-2446 (Rev. 08-19)

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

| | **GENERAL INFORMATION** | |
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Library System

Northern Waters Library Service

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

Northern Waters Library Service is an eight-county library system (serving Ashland, Bayfield, Burnett, Douglas, Iron, Sawyer, Vilas, and Washburn counties) located in one of the more rural areas of the state. NWLS is one of the larger public library systems by geography (8,363 sq. miles) yet one of the smaller in population (150,601 – 2010 census). All member counties have growth rates less than the statewide growth rate, and many are prjected to decrease over the next 20 years. The system service area is generally isolated from the state's urban centers and most libraries are very small. About half the libraries have a service population below 3,000 people and about half have a staff fewer than 2 FTEs.

Five of the libraries in the system are situated in communities that not only sit near the boundaries of the system but also sit on the state border or are very close to the state border. Grantsburg Public Library lies five miles from Minnesota. Superior Public Library lies in the city of Superior which makes up part of the Twin Ports area with Duluth, Minnesota. Land O' Lakes Public Library sits (literally) inches from the border with the Upper Peninsula of Michigan. Presque Isle Community Library resides two miles from Michigan's Upper Peninsula. Hurley Public Library in Hurley, Wisconsin is separated from Ironwood, Michigan by the Montreal River. Circulation to these libraries from their neighboring states accounted for a total of 20,627 transactions in 2015. Individually, that activity was generally lightest for Grantsburg Public Library with 90 circulations, but heaviest for Land O' Lakes Public Library with 9,183 circulations. While that total circulation count only makes up 2% of the total circulation in the system, the usage is very important to these libraries.

Vilas County is the most heavily library-served county, operating nine independent libraries, whereas Douglas County operates one main library with two branches.

Challenging Demographic Indicators

Age -- Residents of the NWLS area over 65 years of age or older make up 18.7% of the population, compared to the state average of 14.8%. The median age of residents in the NWLS region is 42, well above the statewide median age of 38. All of the Wisconsin counties with the oldest population are northern non-metropolitan counties. The NWLS counties of Vilas and Iron have already reached or exceeded the percentage of residents 65 and over expected statewide by 2035.

Ethnicity -- Diversity within the NWLS area's population is quite small, with only about 9% of the population not counted as White in the 2010 census. Yet of that minority group, the NWLS area is home to about 6% of the state's Native American people. The remaining 2% are Hispanic, African-American or Asian.

Education -- NWLS is home to six institutions of higher learning. Northland College and Wisconsin Indianhead Technical College (WITC) - Ashland campus are located in Ashland. The University of Wisconsin - Superior and WITC - Superior campus are located in Superior. Lac Courte Oreilles Ojibwa Community College and a WITC branch are located in Hayward. Twenty-two percent of NWLS area residents have at least a bachelor's degree, compared with 26.8% statewide.

Poverty -- Residents in the NWLS area have a median household income of $41,850 compared to $52,738 in the state. This is a difference of $10,888. There is also a greater percentage of persons living below the poverty level in the NWLS area (15.9%) compared to that of Wisconsin as a whole (13%). Approximately 51% of NWLS area students receive free or reduced school lunches.

Economy -- The areas within NWLS boundaries are a sportsman's paradise with many lakes and streams and over 3 million acres of public lands to explore. NWLS is a high tourism area offering many recreational opportunities with such natural attractions as the Apostle Islands National Lakeshore, the Brule River State Forest, the Chequamegon-Nicolet National Forest (Chequamegon side), the Flambeau River State Forest, Governor Knowles State Forest, the North Country National Scenic Trail, the Northern Highland-American Legion State Forest, and the St. Croix National Scenic Riverway (Namekagon branch). The system area is also home to four Wisconsin state parks: Amnicon Falls, Big Bay, Copper Falls, and Pattison.

Transportation -- The system area contains mostly two-lane state highway with occasional passing lanes. All highways are designated 55 mph with the exception of a 9 mile stretch of US2/53 before entering Superior from the east, and a four-lane

**GENERAL INFORMATION (cont'd.)**

divided expressway (US 53) stretching from the northern terminus outside Superior to the system boundary 68 miles south. One other US route (51) travels the eastern side of the system and the other minor state highways crossing NWLS boundaries include: 13, 35, 63, 70, and 77. To help put in perspective this lack of highway infrastructure, consider that Bayfield County does not operate a single stoplight. Very limited public transportation is available in the region.

Two of Wisconsin's five tribal libraries are members of NWLS, LCO and Lac du Flambeau. NWLS is working on helping Red Cliff becoming re-established as a public library and rejoining the system. We hope to do the same with Bad River in the future.

Funding Challenges

System aids ($529,104) make up 52% of the total NWLS operating budget. 100% of system aids comes from the Universal Service Fund (USF) rather than General Purpose Revenue (GPR), which places system aids in jeopardy since many officials and telephone companies don't believe this is an appropriate use of the USF. Wisconsin public library systems have endured system aid reductions in the past; NWLS saw a 10% cut as recently as 2011. 2012 and subsequent years funding has been flat until last year when we saw the temporary additional aid which NWLS was allotted $35,243 which, in tuen, has become the new base going into 2020.

County requests ($205,327) make up about 20% of the NWLS operating budget. In recognition of the funding constraints counties have also had to endure, NWLS has only asked for flat or one percent increases from counties within the last 10 years. Receiving the full amount of money from counties is challenging since counties are not obligated to fund us. Any large reduction in county payments would have a dramatic effect on services to that county, including Mail-a-Book service for patrons, rural book drops, and collection development grants.

In 2018, members of the Merlin consortium contributed $249,316 for annual ILS maintenance expenses. The Merlin libraries rely on NWLS to manage the ILS to maximize quality library services and economic efficiency.

Grants no longer are available to make up a portion of the NWLS operating budget as it had in the past. The loss of the grant money has had a significant impact on our libraries and the patrons we serve. The Department of Public Instruction informed us in August of 2017 that the Technology Grant ($23,820) will no longer be available to libraries for 2018. This has led to NWLS to find funding for our connection to Overdrive for our member libraries and a loss of technological services (Novelist enhancements to Merlin, the Ancestry database, training for our technology staff, and our ability to offer an electronic periodical service). The Department of Public Instruction has decreed in 2019 that our only remaining grant for delivery is no longer available. We are taking advantage of the new Technology Grant but through our LEAN WI Partnership for our infrastructure needs, which are great.

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:**

The NWLS Technology and Resource Sharing Plan was updated in 2016 and is valid until 2019. We plan to have a new Plan ready for 2020 with the LEAN WI Partnership. The NWLS Strategic Plan was approved in 2012, reviewed in 2015 and 2017, and is valid until the end of 2018. We are planning on a having several NWLS Strategic Plan meetings in late 2019 - early 2020. The Merlin Long Range Plan was adopted in early 2016. In 2017, NWLS provided a strategic planning session for the Merlin Consortium in which they devised a new mission statement and vision. The Merlin Consortium is also undergoing a renewed effort for a complete Plan in late 2019 - early 2020. Merlin Consortium and Director's Meetings were held in February, May, August, and November to involve public library directors in decisions regarding workshop planning, system updates, legislative actions, the OverDrive Advantage account, database subscriptions, technology, and continuing education.

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:**

## 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:**

### 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. Review and update all member library agreements.
2. Encourage all members to participate in the system shared ILS, Merlin.
3. Continue to administer Merlin. This includes developing and monitoring the Merlin budget; managing the database; offering training opportunities and resources; and hosting advisory meetings to discuss policies and procedures.
4. Maintain an accurate Merlin catalog.
5. Encourage member libraries to inventory their collections and assist with that process.
6. Provide member libraries with reports and statistics needed to manage their libraries and to report to their boards and the DLT.
7. Provide collection development grants to members to help them maintain strong collections.
8. Create a culture in which all members share their entire collection.
9. Encourage use of WISCAT for direct ILL.
10. Encourage timely fill of ILL requests.
11. Provide trainings on WISCAT through workshops and in individual sessions.
12. Publicize WISCT updates and training opportunities.
13. Update NWLS ILL procedures.
14. Provide information on BadgerLink and system recources through the NWLS website.
15. Monitor development in the TEACH program, E-rate discounts, BadgerNet, etc. as they apply to NWLS member libraries, the system headquarters, and appropriate application servers.
16. Continue to provide a secure Wide Area Network (WAN) and monitor bandwidth usage by member libraries.
17. Continue to provide PC desktop support and seek discounts on hardware for libraries.
18. Provide OverDrive support for NWLS patrons needing assistance.
19. Provide backup reference services from the resource library, Superior Public Library, through an annual contract.
20. Particiapte in the continued development and expansion of LEAN WI, a technology resource sharing partnership between multiple systems, and "Libraries Win", the joint technology services platform it hosts and maintains. Establish and adopt first iteration of joint LEAN WI Library System Long Range Strategy and Operational Technology Plan.
21. Participate in the strategic growth of the LEAN WI partnership and assist in efforts of technology collaboration with other library systems and organizations.
22. Maintain strategic and operational awareness of federal, state, and regional programs and efforts intended to support and empower library technology services, including: Universal Service Administrative Company School and Library Program (USAC SLP- erate), TEACH Wisconsin, Badger Net, Wisconsin Dept. of Public Instruction Public Library Development Team (DPI PLD), Public Library System Redesign (PLSR), Wisconsin Public Library Consortium (WPLC), and others.
23. Explore collaborative options with other systems to improve ILS services and support.

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

1. We are adding a new teleform product to our ILS for NWLS area patrons.

**ASSURANCES (cont'd)**

2. Work with WVLS to evaluate new ILS possibilities in 2020.
3. Continue the LEAN WI technology partnership with IFLS and WVLS. Major infrastructure upgrades for NWLS are planned for 2020.
4. Work with other systems across the state (Northern primarily) to establish a re-route of materials in order to reduce costs and improve delivery speed and service.

### 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. Collaborate with WVLS to schedule CE programs in consultation with member library directors and NWLS staff through surveys, email, and meetings.
2. Collaborate with WVLS to publicize CE programs held by NWLS and by other systems.
3. Collaborate with WVLS to provide an average of at least one CE event per month in order to meet a wide variety of training needs.
4. Monitor progress toward certification and re-certification for member library directors.
5. Inform member library directors when certification requirements change.
6. Provide at least one workshop for public library trustees.
7. Actively promote BadgerLink.
8. Maintain training resources on the NWLS and WVLS website.
9. Provide orientation for new NWLS board members and new member library directors.
10. Continue subscription to GoToMeeting/Webinar to facilitate online meetings and workshops.
11. Maintain scholarships for WLA Membership and Conferences.

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

1. Collaboration with WVLS will be continued on a Youth Services Information Exchange Group. This includes the Youth Services Staff from Vilas County in NWLS and various WVLS Youth Services Staff.
2. NWLS has partnered with WVLS in Continuing Education and Inclusive services. Both systems share one staff person each.

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

Sherry Machones, NWLS Director, serves as CE certification consultant for NWLS, as well as the Inclusive Services Consultant for both NWLS and WVLS. Jamie Matczak, WVLS Continuing Education Consultant, serves in that capacity for both systems.

**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:**

WVLS

### 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.**

1. Continue to participate in statewide delivery service operated by the South Central Library System.
2. Continue exploring methods to reduce intersystem delivery costs and increase the number of delivery days.
3. Encourage all members of Merlin to pay for a third day of delivery.
4. Perform two delivery volume studies per year and regularly evaluate delivery service.
5. Maintain a system listserv.
6. Maintain an updated library directory.
7. Monitor legislative issues and inform all library directors and NWLS board members of issues of significance.
8. Continue to provide a toll-free phone number for libraries outside the system's calling exchange.

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

Work with other systems across the state (Northern primarily) to establish a re-route of materials in order to reduce costs and improve delivery speed.

**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:**

We will have a new Plan for 2020 which will incorporate the plans for the LEAN WI Partnership.

**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:**

Sherry Machones, Director - Chapter 43, County and Municipal Funding of Libraries, Library Administration (Policy Development, Planning, Standards, Budgets, Hiring a Director, Trustee Recruitment, Grant Development, Trustee Orientations), Youth Services, Adult Services, Intellectual Freedom, Collection Development, Library Service Policies, Programming, Fundraising, Marketing, Certification, Public Library Director/Staff Orientations, Inclusive Services for NWLS and WVLS, Advocacy, Resource Sharing
Michelle Gostomski, Business Manager - Fundraising, Grant Development, Budgets
Jamie Matczak, Education Consultant for WVLS and NWLS - Continuing Education and Training
Tony Kriskovich, IT Director -Technology Planning and Budgeting, Building/Remodeling, E-Rate, TEACH Grants, Contracts
Jackee Johnson, ILS Administrator - ILS Software Functionality, Cataloging, Circulation Policies, Digitization, ILS Processes
Anne Marie Itzin, ILS Assistant/Assistant Director - ILS Software Functionality, Statistics, Cataloging, Electronic Resources (Databases, BadgerLink), Digitization, ILS Processes

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

1. Continue to offer consulting to member library directors, staff and trustees on topics including, but not limited to: public library administration, adult and youth services, shared library automation, technical services, interlibrary loan, staff development, library planning, collection development, special needs/populations, general library technology, state reports, and legislative actions affecting Chapter 43.
2. Upon request, continue to provide information for local library board, tribal council, or county board meetings.
3. Conduct new director orientation within 30 days of hire.
4. Set aside time at Director's Meetings to discuss challenges faced by member libraries.
5. Encourage member libraries to develop strategic plans.
6. Provide grant support services for member libraries, including identification of grant sources and grantwriting assistance.
7. Assist member libraries in the process of filing Annual Reports.
8. Upon request, provide consulting reports in the areas of general library organization and workflow analysis.
9. Continue any and all consultation via phone, email, webinars, or in-person visits, depending upon need.
10. Contine to provide in depth consulting services to non NWLS tribal libraries to encourage full participation in NWLS and the Merlin Consortium.
11. Facilitate participation of member library staff, trustees, and supporters in local, regional, and statewide advancement events, e.g., candidate forums, WLA Library Legislative Day.
12. Support member library staff and trustee advocacy efforts at all levels - local, county and state.
13. Advocate on the state level for system and public library initiatives, as well as other items included in the Wisconsin Library Association's legislative agenda of significance to the entire library community.
14. Represent the interests of member libraries to the Legislature and the Department of Public Instruction in the development of statewide library policy or services.
15. Inform member library staff, trustees, and supporters of pending legislation on the state and national levels that may affect libraries and explain how the proposed legislation might affect system and local library service.

**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. NWLS Director, Sherry Machones, will continue to participate in Inclusive Services meetings across the state and lend experience/assistance as applicable.
2. NWLS Director has offered to provide Inclusive Service consulting to WVLS and will participate in any CE activities that result.
3. NWLS Director will continue to lead the IDEA (Inclusivity, Diversity, Equity, Access) Team that is comprised of staff members of both NWLS and WVLS libraries.
4. With WVLS partnership, provide member libraries with access to expertise and consulting to assist them in planning, developing, and evaluating inclusive services, guided by the Division of Libraries and Technology's Inclusive Services Guide and Assessement.
5. Maintain collection of professional materials on inclusive services.

**ASSURANCES (cont'd)**

6. Share Inclusive Services information and resources via NWLS and WVLS communications channels (blog, email, newsletter).
7. Maintain current and relevant Inclusive Services resources and tools on the NWLS and WVLS website.
8. Support member library outreach efforts to extend services to underserved populations.

**Other Service Programs**

Wis. Stat. § 43.24(2)(i) 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.)**

1. Continue the Mail-A-Book program which is available for homebound citizens and those living at least 15 miles from the nearest public library. NWLS performs a Mail-A-Book patron audit yearly to make sure those who did not need the service were not abusing the program. There remain over 450 active patrons using the service.

2. Maintain a list of rural bookdrops, and evaluate their condition and usage for replacement/retirement.

3. Join in the shared WVLS/IFLS collection of makerspace resources, adding our memory kits to be available to the three systems.

4. Continue collaboration with the Bridges Library System to support the "1,000 Books Before Kindergarten App".

**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.

**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.*

1. CONTINUING EDUCATION - NWLS will partner with public library systems and outside agencies for events including the Wild Wisconsin Winter Web Conference, Wisconsin Trustee Training Week., the Lake Superior Library Conference and Unsymposium, and the Childrens Book Fair. As of 2018 WVLS began coordinating continuing education on behalf of WVLS and NWLS, and NWLS began inclusive services consulting on behalf of WVLS and NFLS member libraries.

2. DELIVERY - Since WVLS and IFLS have contracts with Waltco, we are benefiting from their request to exchange materials directly instead of sending materials through the SCLS state delivery.

3. DIGITAL CONTENT - The Wisconsin Public Library Consortium's most significan collaborative project is the pooling of system and public library funds to support the Wisconsin Digital Library.

4. 1,000 BOOKS BEFORE KINDERGARTEN APP - A partnership with the Bridges Library System provides an app to patrons of NWLS libraries that have implemented "1,000 Books Before Kindergarten" programs. The app provides a convenient method for patrons to track materials read as they participate in the program, and offers options for viewing and reporting results.

5. DATABASES AND PROFESSIONAL MATERIALS - NWLS provides access to databases (Ancestry, Gale Courses) and professional materials for member libraries.

6. ADVANCED NETWORKING - WVLS is a member of the Wausau Community Area Network (WCAN) and IFLS is a member of the Chippewa Valley Inter-Networking Consortium (CINC) allowing each system to dedicate a 1,000 Mbps circuit to the LEAN WI shared data center. Equivalent circuits are estimated to have a base cost of approximately $1500 per month each. Assuming E-Rate discounts, the estimated annual cost for leasing and maintaining such a circuit and supporting equipment independently would be approximately $15,000. The average cost of membership and maintenance for the WCAN and CINC is approximately $3,500 annually, resulting in a direct estimated cost benefit to each system for participation in regional collaborative networks of approximately $11,500 in 2020.

The BadgerNet Network is a service contracted under the Wisconsin Dept. of Administration (DOA) with significant operations and funding program management efforts performed by the DOA's Technology for Educational Achievement (TEACH) program on behalf of schools and libraries. Additionally, the Wisconsin Dept. of Public Instruction's Division for Libraries and Technology put in significant effort, coordinating with DOA, TEACH, and Library Systems to ensure this massive statewide collaborative effort runs as smoothly and efficiently as possible. This is an annually recurring element of collaboration effecting a direct individual cost benefit to library systems and libraries and enables further collaborative value between library systems and member libraries. In 2020, LEAN WI partners will be operating one or two 10Gbps BadgerNet circuits. It is estimated that an equivalent replacement service (assuming E-Rate discounts and ideal circumstances for all aspects of service) would have caused a minimum net cost increase of approximately $65,000 for the head-end circuits and approximately $3,000 per BadgerNet member site on average. This results in an estimated direct net cost benefit of approximately $395,000 for LEAN WI partners and member libraries.

Each LEAN WI partner is a member and partner of the private, non-profit research and educational network services provider, WiscNet. Each system contributes a $1,500 membership fee annually to participate in a variety of valuable peer information sharing opportunities and to leverage various technology services. As a member, each partner is eligible for network services, which includes Internet transiting services with no upper limits to throughput. The cost of WiscNet network services is approximately $10,000 per year per partner. Comparatively, 10 Gigabit transit services listed under State of Wisconsin contract 505004-O14-BCNMGSRVCS-01 are not expressly priced, but scale to approximately $8,000-$10,000 per month or $96,000 to $120,000 per year. WiscNet network services include several benefits (such as assigning large blocks of public IP addresses and providing service at multiple connection points) not available from other vendors, or available or additional cost. These secondary benefits have an approximate value of $20,000 per year across LEAN WI partners. WiscNet does not charge any additional fees for library members behind the LEAN WI converged Wide Area Network (WAN) resulting in a minimum collaborative cost benefit value of $1500 per library. Partners also share access to a highly discounted data center facility leased through WiscNet with rack space and power costs estimated to be approximately $15,000 in 2020 or roughly $5,000 per LEAN WI partner. Equivalent self-managed or outsourced facilities vary widely in cost from approximately $12,000 to $40,000+ per LEAN WI partner.

Cost Benefit Element(s)
    Activity: Community Area Networks (LEAN WI Partners {IFLS, WVLS}, CCITC, CVTC, NTC, several K12 districts and
    many other members)
    Amount: $23,000.

Average: $11,500. (per partner – IFLS, WVLS)


Activity: BadgerNet Network (DOA-DET/TEACH, DPI, LEAN WI Partners, Library Members)
Amount: $395,000.
Average: $131,700. (per partner)


Activity: WiscNet Partnership (LEAN WI Partners, Library Members, WiscNet)
Amount: $340,000.
Average: $113,300. (per partner)


7. LEAN WI PARTNERSHIP - Indianhead Federated Library System (IFLS), Northern Waters Library Service (NWLS), and Wisconsin Valley Library Service (WVLS) collaborate directly in the Libraries an Enterprise Applications Nexus of Wisconsin (LEAN WI) partnership. This partnership represents 118 public libraries and branches across 25 counties. Much of the collaboration between the partnering systems and our public library members continues to occur in the traditional sense, between Library Systems and Public Library members. Intra-partnership collaboration, exchange of services, deduplication of efforts, and ongoing efforts to strengthen the production status of our shared infrastructure is expected to continue during 2020.


LEAN WI partners will continue jointly collaborating on our collection of Makerspace equipment and other creative technologies with our collective membership, reassessing existing capital and recalibrating the service along with the growth in partnership. This element of service is expected to remain one of the most involved services directly facing our public library members in 2020 and has been separated as an element of collaboration under the LEAN WI partnership facet.


A joint website service was developed during 2018. This comprehensive service succeeded separate legacy services combining site hosting, design, and webmaster training elements grown in adoption during 2019. The inclusion of NWLS as a partner in 2019 will likely add pressure for additional growth of services during 2020, presenting the partnership challenge and opportunity to review and revise a joint strategy to sustainably grow and maintain the various subservices. Website services have been separated as an element of collaboration under the LEAN WI partnership facet.


During 2019 LEAN WI partners expanded on external collaboration efforts initiated in 2018, leveraging Library Service and Technology Act (LSTA) grant funding to Wisconsin from the Institute of Museum and Library Services (IMLS) which is channeled in part through and managed by the Wisconsin Department of Public Instruction (DPI). A durable statewide Backup and Archiving project is under development, with capital procured and current in the planning stages for setup and initial implementation. It is yet to be seen to what extent this resource will be shared or to cost valued across the numerous Public Library Systems which have contributed various funding allocations and human resources. For 2020 a raw cost benefit to the LEAN WI partnership for the specific backup and archive needs met will be estimated, with significant revisions likely for 2021 planning in Aug-Sept 2020, and 2020 reporting in Jan 2021. A base of $1,000,000 (approximate initial capitalization cost for both sites) divided by the initial five-year lifecycle is used. Estimated (prepaid) equipment operating overhead is $18,000 for the LEAN WI host site.


The combined human resources and operational overhead for LEAN WI services is estimated to be approximately $804,000. The combined estimated replacement value of this service platform for public library collaborators is estimated to be over $42.8 million. The offset cost benefit value of the LEAN WI partnership is estimated at approximately $41.8 million. The LEAN WI partnership is one of equitability and thus, represents average estimated cost benefit of approximately $13.9 million per partner system in 2020.

Cost Benefit Element(s)
    Activity: Technology Services (LEAN WI Partners and Library Members)
    Amount: $31,904,000.
    Average: $10,635,000. (per partner)


    Activity: Website Services (LEAN WI Partners and Library Members)
    Amount: $1,309,000.
    Average: $436,600. (per partner)


    Activity: Makerspace Kits Shared Lending Pool (LEAN WI Partners and Library Members)
    Amount: $2,170,000.
    Average: $723,300. (per partner)

Activity: Backup and Archive (LEAN WI Partners and Library Members)
Amount: $6,643,000.
Average: $2,214,300. (per partner)

Please note, here is a summary table reflecting broad cost benefit categories and replacement context. This is for library system staff (technology directors and directors) to be able to better visualize the broad categories and values as well as their gross and net replacement values.

|  | Human Resources | Application Services | Totals |
|---|---|---|---|
| LEAN WI Est. Operational Overhead | $ 515,000 | $ 289,000 | $ 804,000 |
| Tech Services - Libraries | $ 26,750,000 | $ 5,154,000 | $ 31,904,000 |
| Website Program - Libraries | $ 1,284,000 | $ 25,000 | $ 1,309,000 |
| Makerspace Program - Libraries | $ 1,770,000 | $ 400,000 | $ 2,170,000 |
| Backup and Archive - Libraries | $ 2,755,000 | $ 3,888,000 | $ 6,643,000 |
| Est. Replacement Value - Total | $ 33,074,000 | $ 9,756,000 | $ 42,830,000 |
| LEAN WI Offset Cost Benefit Value | $ 32,559,000 | $ 9,249,000 | $ 41,808,000 |

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

| Activity | Amount |
|---|---|
| 1.  Shared CE staff and events (with multiple systems and ouside agencies) | $79,000 |
| 2. Direct delivery to WVLS and IFLS | $5,000 |
| 3. Digital Content | $1,000,000 |
| 4. 1,000 Books Before Kindergarten App | $5,000 |
| 5. Databases and Professional Materials | $110,000 |
| 6. Advanced Networking | $256,500 |
| 7. Lean WI Partnership | $14,009,200 |
| 8. | |

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

| Activity | Amount |
|---|---|
| 9. | |
| 10. | |
| **Cost Benefit Total** | $15,464,700 |

**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 | Signature of System Director | Date Signed *Mo./Day/Yr.* |
|---|---|---|
| Sherry Machones | | 9/21/2019 |
| Name of System Board President | Signature of System Board President | Date Signed *Mo./Day/Yr.* |
| Jeff Burke | | 9/21/2019 |
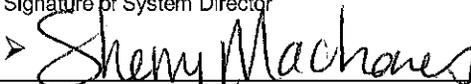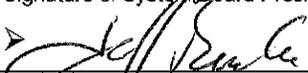
**FOR DPI USE**
**LIBRARY SYSTEM PLAN APPROVAL**

| Pursuant to Wis. Statutes, the plan contained herein is: | DLT Assistant Superintendent Signature | Date Signed *Mo./Day/Yr.* |
|---|---|---|
| [X] Approved<br>[ ] Provisionally Approved *See Comments.*<br>[ ] Not Approved *See Comments.* | | 11/1/2019 |
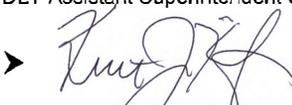
Comments

## 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. ILL & Reference | $97,648 | | | $23,027 | |
| 2. Merlin & Technology | $135,524 | $42,854 | | $203,916 | |
| 3. Cooperative Cataloging | $23,065 | $300 | | $15,878 | |
| 4. | | | | | |
| 5. Electronic Resources | $8,785 | $2,785 | | $59,927 | |
| **Program Total** | $265,022 | $45,939 | $0 | $302,748 | $613,709 |
| **Continuing Education and Consulting Service*** | | | | | |
| 1. Continuing Education | $48,599 | | | | |
| 2. Consulting Service | $43,940 | | | $35,621 | |
| **Program Total** | $92,539 | $0 | $0 | $35,621 | $128,160 |
| | | | | | |
| **Delivery Services** | $51,195 | | | $65,386 | $116,581 |
| **Library Services to Special Users** | $9,226 | | | | $9,226 |
| **Library Collection Development** | $9,227 | | | $35,272 | $44,499 |
| **Direct Payment to Members for Nonresident Access** | | | | | $0 |
| **Direct Nonresident Access Payments Across System Borders** | | | | | $0 |
| **Library Services to Youth** | $14,408 | | | | $14,408 |
| **Public Information** | $23,884 | | | | $23,884 |
| **Administration** | $98,846 | | | 1017 | $99,863 |
| **Subtotal** | $206,786 | $0 | $0 | $101,675 | $308,461 |
| **Other System Programs** | | | | | |
| 1. Mail-A-Book | | | | $50,686 | $50,686 |
| 2. | | | | | $0 |
| **Program Total** | $0 | $0 | $0 | $50,686 | $50,686 |
| **Grand Totals** | $564,347 | $45,939 | $0 | $490,730 | $1,101,016 |

*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).