Technology and Resource Sharing Plan
2025-2029

Approved by the SWLS Board of Trustees on
November 20, 2024

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General Information

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Date Technology and Resource Sharing Plan was Approved by the System Board:
November 20, 2024

Introduction and Purpose

Public library systems in Wisconsin are required to provide a variety of services in order to qualify for state funding. Section 43.24 (2)(m) requires systems to engage in "planning with the division and with participating libraries and other types of libraries in the area in regard to library technology and the sharing of resources." The state requires that technology and resource sharing plans be submitted every five years at minimum. This plan covers a five-year period from January 1, 2025 through December 31, 2029.

Background

History

SWLS Automation services began in 1990 when a System Automation Consultant was hired. One of the first duties of this consultant was to form a Public Library Automation Advisory Committee. This committee began the task of evaluating various library automation vendors. By 1994, a library automation vendor, Dynix, had been chosen, and NetSouthwest was formed with 17 of 28 SWLS member libraries as the founding participants in the consortium. In 2001, another SWLS member library joined the consortium, bringing the total number to 18 member libraries. Eight additional libraries joined the consortium in 2002 when the System wrote an LSTA grant to help cover costs. The number of NetSouthwest members stayed steady at 26 (and one branch) until 2006 when a new library was formed, and the 27th member joined. In 2007, one member library opened a branch library, bringing the total to 27 member libraries and two branches. In 2021, the final existing SWLS member library joined NetSouthwest, bringing together all 28 public libraries and two branches sharing the integrated library system (ILS) and its catalog and patron database.

Development of Services

In 1997, the Dynix database went live. Technology services at that time included the automated circulation software and the online library catalog as well as a simple email program known as "D-mail." D-mail was available through the Dynix software and only between members of NetSouthwest. Internet and email were made available through telephone company, TDS.

In 1998, TEACH T-1 lines were installed at System Headquarters and in the original 17 consortium libraries. By 2015, all but five public libraries and one branch library had T-1 lines.

The major accomplishments for the years 2003–2024 were as follows:

2003
- ILS migrated from Dynix to Horizon
- Email server purchased, Microsoft Exchange software used to provide individual email accounts
- Member libraries on the network had computers added to the network domain

2004
- Additional data line installed for SWLS WAN
- Centralized anti-virus provided to SWLS network libraries
- Switched from TDS to WiscNet for internet service
- SWLS purchased computers from state e-procurement program for libraries and configured computers for network

2005
- Server added to SWLS network to ensure Windows OS updates were installed on all WAN computers
- Spam filter installed
- Public and Home drives created

2006
- State network upgraded – Badgernet Converged Network (BCN) replaced old frame-relay cloud structure
- Network management outsourced to Applied Micro
- SWLS WAN's core router replaced
- Cisco's Network Admission Control (NAC) device installed

2007
- Horizon Information Portal server installed
- Joined AskAway Virtual Reference consortium
- Joined Wisconsin Public Library Consortium (WPLC) and obtained access to OverDrive digital content

2008
- Tech Tuesday workshop created
- Subscribed to OPAL for online tech training

- New blogs created
- Member libraries replaced routers and 27 libraries provided wireless Internet access
- Cisco NAC disabled

2009
- Search for replacement ILS begins
- Discussions on restructuring NetSouthwest Consortium held
- SWLS purchases NetLibrary subject sets (LSTA grant)
- SWLS subscribes to LearningExpressLibrary (LEL) database with computer skills module (LSTA grant)

2010
- Auto-Graphics AGent VERSO Iluminar ILS software chosen
- Switched network management from Applied Micro to Technology Assurance Corporation
- LEL basic database picked up by Badgerlink, SWLS continues with computer skills module and adds Mango Languages database (LSTA grant)
- SWLS replaces OPAL with GoToMeeting (LSTA grant)
- SWLS technology services are separated from the NetSouthwest Consortium agreement

2011
- AGent VERSO Iluminar ILS goes live in late January 2011
- SWLS Technology Committee begins to explore print and time management software solutions

2012
- SWLS Technology Committee recommends Deep Freeze—SWLS negotiates group purchase for 13 libraries
- SWLS explores Help Desk software
- SWLS subscribes to ConsumerReports.org databases (LSTA grant), Cypress Resume, and AtoZ World Travel databases (state aid)

2013
- Several SWLS member libraries experienced issues with their bandwidth
- Technology plan updated
- Digital Media Buying Pool created by WPLC to raise $1 million for digital content. SWLS patron use of OverDrive grows
- Network server is replaced
- Standard Operating Procedures for identifying and investigating new technologies created

2014
- Iluminar is replaced with VERSO 4
- Member libraries begin to take over support for OverDrive issues for their own patrons
- SWLS creates a Dropbox account to provide access to important documents for those libraries not on the SWLS WAN
- Technology Competencies for library directors and library staff created
- BCN libraries get fiber and more bandwidth

2015
- SWLS begins a mobile tech support program
- Grant for pilot projects in technology program created
- 2016–2018 technology and resource sharing planning process begun

2016
- Mobile Maker Space kits provide libraries chance to try new equipment

2017
- State LSTA grant for redesign of SWLS website awarded

2018
- Work completed on redesign of SWLS website
- TEACH education grant received to reimburse small-library attendees of tech workshops
- Issued RFP in search of partners for technology support

2019
- Formed agreement with Lakeshores Library System (LLS, now Prairie Lakes Library System [PLLS]) to provide tech support to SWLS libraries
- With LSTA grant funding, co-located the SWLS network head-end on new equipment at the LLS Waterford location in collaboration with LLS and Arrowhead Library System
- Provided new network equipment and expanded/updated Wi-Fi access points at SWLS member libraries that needed equipment with funding from LSTA grant
- Provided Deep Freeze software to all interested locations with LSTA grant funding

2020
- Wi-Fi signal extended to areas outside of library buildings at interested locations using LSTA and CARES Act grant funding in response to COVID-19 pandemic and reduced numbers of people allowed inside library buildings
- PaperCut print management software employed at interested locations to improve service to patrons using their own devices to print at member libraries
- Automation for copy cataloging introduced to ILS cataloging request workflow, developed by LLS (now PLLS) tech staff

2021
- Dwight T. Parker Public Library in Fennimore joins NetSouthwest with money from an LSTA grant helping to eliminate cost barriers
- Added Gale Courses and Udemy to electronic resources offering for all member libraries, funded by LSTA grant for initial year
- Added and replaced aging uninterrupted power supply (UPS) devices at several member library locations

2022
- Provided self-checkout stations to interested member libraries with machines, software, and five years of EnvisionWare vendor support paid for with an American Rescue Plan Act (ARPA) grant

- Upgraded member library circ desk peripherals (barcode scanners, receipt printers, other equipment) systemwide using money from LSTA and ARPA grants
- Completed three-year push to update network equipment and PCs at all member libraries
- Enhanced automated copy cataloging app to improve records retrieval, to add advance holds capability, and to aid with updating and standardizing select subject headings
- VERSO updated its MARC editing tool used within the VERSO ILS

2023
- Integrated the WPLC digital library into VERSO via an OverDrive API
- Awarded a Technology Reserve Fund Grant to Mineral Point Public Library for a pilot project to collect Wonder Books

2024
- Replaced the SWLS server and updated network equipment for approximately one-third of member libraries using LSTA grant funding
- Worked extensively with Auto-Graphics staff to improve library experience using the ILS
- Awarded a Technology Reserve Fund Grant to Hazel Green Public Library for a film and media digitization pilot project
- Developed a new strategic plan which includes technology and resource sharing goals

Needs and Assets Assessment

Due to director turnover in 2023, SWLS plans to continue many of our existing goals with minor modifications to ensure technology and resource sharing within the system and with statewide partners results in strengthening library services to the communities we serve.

The current state of our technology infrastructure is considered strong, with focus over the last few years ensuring we meet and maintain standards for end user devices, bandwidth, wireless access points, and technology support. Much of the improvement to our current infrastructure is thanks to funding made available during the COVID-19 pandemic, and we plan to utilize available funds from the Institute of Museum and Library Services Library Services and Technology Act to continue to update and improve infrastructure, as available over, the course of our 2025–2029 plan.

The priorities of our plan were identified through ongoing assessment and review of our current plan as well as results of the 2025–2029 SWLS Strategic Plan, which was started in 2023 and included input from member libraries, local library and system library boards, SWLS staff, and other community stakeholders. The 2025–2029 Technology and Resource Sharing Plan was drafted by SWLS staff and Jim Novy, IT Director at PLLS, who SWLS contracts with to provide technology support. The draft plan was reviewed by the SWLS Technology Committee prior to sharing with member library directors for further comment. The SWLS Board of Trustees reviewed and approved this plan on November 20, 2024. The following encompass overarching goals for this plan:

- Ensuring that SWLS and the member libraries meet their communities' needs for technology services

- Maintaining a shared integrated library system (ILS)
- Providing technology-related training and administration to support member libraries
- Facilitating of resource sharing among SWLS libraries and between Wisconsin library systems
- Ensuring that SWLS staff have the technology skills to support member libraries

Resource Sharing

Integrated Library System

SWLS manages the shared ILS for all 28 public libraries (31 locations, including system headquarters) in the service area. VERSO by Auto-Graphics is a fully web-based ILS that is hosted by the vendor and does not include the use of a discovery layer. NCIP protocols allow for integration between the ILS and WISCAT, which currently utilizes the SHAREiT product, also by Auto-Graphics. The ILS also allows for an Overdrive API that integrates the WPLC digital library directly into the public access catalog and facilitates authentication and direct circulation of that material from the ILS interface.

Wide Area Network

The SWLS wide area network (WAN) provides Internet services and access to centrally-managed applications for our member libraries. Twenty-five SWLS member libraries and branch locations are connected to the WAN using TEACH links and another seven are connected by commercial providers with VPN connections. SWLS contracts with PLLS for circuit monitoring, outage response, and network maintenance.

Interlibrary Loan

SWLS contacts with Auto-Graphics to provide member libraries with access to the VERSO integrated library system. Through VERSO, library staff and patrons are able to request resources owned by any library in the SWLS service area. Additionally, because Auto-Graphics manages WISCAT, library staff and patrons are able to request materials held by libraries in other systems without navigating to an additional platform. SWLS also acts as the WISCAT clearinghouse for school districts served by the Cooperative Educational Service Agency 3 (CESA 3).

Delivery

SWLS offers delivery to all member libraries three days a week (Monday, Wednesday, and Friday), utilizing a team of six part-time delivery drivers and three delivery vans. We also provide last-mile delivery to the UW-Platteville Karrmann Library as part of statewide delivery services managed by South Central Library System (SCLS). SWLS delivery visits Dodgeville

Public Library, Platteville Public Library, and Karrmann Library on an abbreviated delivery route on Tuesdays and Thursdays to retrieve materials moving through statewide delivery and between UW System Libraries. Library materials being transferred from Karrmann Library are dropped off at Spring Green Public Library (an SCLS-member library) on Mondays, Wednesdays, and Fridays, as needed.

SWLS also holds a contract to provide delivery of materials to school districts located within CESA 3 on a weekly basis. This contract not only provides cost sharing between CESA 3 and SWLS, it also helps move materials owned by public libraries into school districts more quickly and efficiently.

Goals and Activities

The following goals and objectives apply to all Southwest Wisconsin Library System members, unless otherwise indicated.

GOAL 1: SWLS member libraries provide access to technology resources to help their communities meet needs related to personal goals and community priorities

Objectives:

- SWLS will continue a partnership with PLLS to provide and improve technology support
- SWLS will maintain and encourage adoption of shared technology at member libraries
- SWLS will prioritize development of a new website for better access to information for member libraries and the public
- SWLS will utilize a portion of available LSTA grant funding to maintain or improve member library network access equipment, as available
- SWLS will promote and sustain a systemwide grant program to support member library technology pilot projects using the SWLS Technology Reserve Fund
- SWLS Technology Committee will explore and advise on emerging technology, tools, and trends that may be beneficial to member libraries

GOAL 2: SWLS member libraries have staff with technology expertise needed to assist patrons with their technology needs

Objectives:

- SWLS will sponsor at least 10 hours of technology-related continuing education for member library staff annually
- SWLS staff will complete technology-related continuing education and training each year

GOAL 3: The shared integrated library system (ILS) meets the needs of the NetSouthwest member library staff and patrons

Objectives:

- SWLS will designate a staff member to serve as a liaison between the ILS provider and member libraries
- SWLS ILS/ILL consultant will maintain a working knowledge of ILS functionality and advise library staff on how updates will affect them
- The NetSouthwest Best Practices Committee will meet at least twice a year to review best practices and promote consistency of ILS use among member libraries
- SWLS will coordinate routine maintenance of the shared catalog and patron databases
- SWLS will coordinate regular evaluation to ensure that the ILS meets member library needs

GOAL 4: Resources are shared among all SWLS libraries and other Wisconsin library systems and partners

Objectives:

- SWLS will facilitate group purchasing of databases, software, and technology
- SWLS will emphasize and encourage collaborative collection development; open collection sharing—including local history collections—across member libraries; and encourage member library participation on committees to learn, share, and advocate on behalf of patrons.
- SWLS will continue to collaborate with other library systems and partners to create cost- and resource-sharing where possible

Goal 1: SWLS member libraries provide access to technology resources to help their communities meet needs related to personal goals and community priorities						*Use to track goal progress*	
Objectives and Activities	Person(s) Responsible for Ensuring Activities are Completed	Timeline for Completing the Objective and Activities	Resources Needed to Achieve Objective	Cost	Evaluation Method	Progress Toward Achieving Objective	Comments
Objective 1.1 *SWLS will continue a partnership with PLLS to provide and improve technology support*	SWLS Director, PLLS IT staff.	Contract and costs are reviewed on an annual basis, and we anticipate having this agreement in place throughout the life of the 2025–2029 plan.	Per the agreement, PLLS will continue to assist SWLS member libraries with technology assistance, network and device monitoring, offsite equipment storage, software updates and administration, and other items as needed. PLLS will also assess the health of SWLS technology infrastructure and provide expertise and assistance as necessary.	For 2025, the cost of these contracted services is expected to be $80,300. Additional costs may be incurred if unexpected equipment replacement is necessary.	SWLS staff and the SWLS Technology Committee evaluate services provided by PLLS on an annual basis to ensure they meet member library needs. SWLS and PLLS also review the agreement regularly to ensure a positive cost-sharing model for both SWLS and PLLS.		
Objective 1.2 *SWLS will maintain and encourage adoption of shared technology at member libraries*	SWLS Director, member library directors and boards	Ongoing	The biggest resource needed is funds to cover equipment upgrades and/or replacements. Most member libraries use a rotating equipment replacement schedule.	Costs are based on member library needs and are covered by member library budgets.	SWLS works with PLLS IT staff to ensure our libraries have technology that meets the requirements of our network and the needs of library patrons. PLLS staff evaluate library equipment and recommend replacement on an annual basis.		

Objective 1.3 *SWLS will prioritize development of a new website to for access to information for member libraries and the public*	SWLS Director, other SWLS staff as needed	2025	SWLS will contract with a website designer to complete this work. We will also investigate whether another library system may be able to help support/ maintain our website moving forward.	We anticipate this cost to be around $7,000.	We will work the SWLS Technology Committee to evaluate our website on an annual basis, and make improvements as our budget allows.		
Activities to Achieve Objective 2.1: Identify website design firm	SWLS Director	Summer 2025	SWLS will most likely utilize an RFP/RFQ process to obtain quotes for this work.	We anticipate this to cost around $5,000 of the total above.	SWLS will evaluate potential website design vendors using a rubric.		
Activities to Achieve Objective 2.1: Identify firm or library system to host website	SWLS Director	Summer 2025	SWLS will first approach other library systems to see if costs savings can be achieved through resource sharing. We will look to other vendors as a secondary solution.	We anticipate this cost to be around $2,000 of the total above.	SWLS will evaluate potential web hosts using a rubric.		
Objective 1.4 *SWLS will utilize a portion of available LSTA grant funding to maintain or improve member library network access equipment, as available*	SWLS Director, PLLS IT staff	2025–2026	We anticipate replacing network equipment including routers, switches, and indoor access points at 17 of 31 SWLS locations over two years. Equipment at 14 locations was replaced in 2024.	We anticipate an investment of up to $15,000 of LSTA funds across two years.	Evaluation of equipment purchased is performed by PLLS IT staff and reported to SWLS staff and member libraries.		
Objective 1.5 *SWLS will promote and sustain a systemwide grant program to support member library technology pilot projects using the SWLS Technology Reserve Fund*	SWLS Director, SWLS Technology Committee	Annually, on an as-requested basis, while funding is available.	A portion of system membership fees are set aside each year for technology pilot programs. Resources vary based on each proposal.	We anticipate making up to $3,000 available each year. Funding is provided by member libraries.	The SWLS Technology Committee reviews, evaluates, and makes recommendations on the approval/adoption of technology reserve grants.		

Objective 1.6 *SWLS Technology Committee will explore and advise on emerging technology, tools, and trends that may be beneficial to member libraries*	SWLS Director, SWLS Technology Committee	Ongoing	Resources will vary based on emerging technology, trends, and tools.	Included in PLLS costs listed in Section 1.1.	The SWLS Technology Committee will develop evaluation tools as necessary, based on the type of content. Evaluation methods will be shared with all member libraries prior to systemwide adoption.		

Goal 2: *SWLS member libraries have staff with technology expertise needed to assist patrons with their technology needs*						*Use to track goal progress*	
Objectives and Activities	**Person(s) Responsible for Ensuring Activities are Completed**	**Timeline for Completing the Objective and Activities**	**Resources Needed to Achieve Objective**	**Cost**	**Evaluation Method**	**Progress Toward Achieving Objective**	**Comments**
Objective 2.1 *SWLS will sponsor at least 10 hours of technology-related continuing education for member library staff annually*	SWLS Director, Outreach and Continuing Education Consultant	Ongoing	Resources include access to library technology experts who can train and motivate member library staff around new and emerging technologies. We anticipate that we will partner with other library systems to offer some of this content and share costs.	Costs will vary based on content and cost-sharing agreements.	Evaluation of continuing education (CE) opportunities will be completed using SWLS's standard CE evaluation form.		
Objective 2.2 *SWLS staff will complete technology-related continuing education and training each year*	All SWLS professional staff	Ongoing	Necessary resources will be allocated based on the training needs of each professional position.	Up to $4,000 annually.	Eligibility and evaluation will be based on role and job function.		

Goal 3: *The shared integrated library system (ILS) meets the needs of NetSouthwest member library staff and patrons*						*Use to track goal progress*	
Objectives and Activities	Person(s) Responsible for Ensuring Activities are Completed	Timeline for Completing the Objective and Activities	Resources Needed to Achieve Objective	Cost	Evaluation Method	Progress Toward Achieving Objective	Comments
Objective 3.1 *SWLS will designate a staff member to serve as a liaison between the ILS provider and member libraries*	SWLS Director, ILS/ILL Consultant	Ongoing	Staffing levels need to be sufficient to allow ILS/ILL Consultant the time to be an active liaison.	85 percent of ILS/ILL Consultant salary is covered by NetSouthwest Member Libraries. An additional 15% of salary comes from state aid.	Annual personnel reviews including a survey welcoming feedback from member libraries regarding effectiveness of this position.		
Objective 3.2 *SWLS ILS/ILL Consultant will maintain a working knowledge of ILS functionality and advise library staff on how updates will affect them*	ILS/ILL Consultant	Ongoing	Training time and opportunities through ILS vendor and external resources like MarcEdit.	Training costs are included in technology training costs listed in 2.2.	Annual personnel reviews, including a survey welcoming feedback from member libraries regarding effectiveness of this position.		
Objective 3.3 *The NetSouthwest Best Practices Committee will meet at least twice a year to review best practices and promote consistency of ILS use among member libraries*	ILS/ILL Consultant	Ongoing	Resources include access to Zoom meeting space and time; ILS/ILL Consultant time and pay commensurate with this activity.	Zoom licenses included in general administrative overhead.	SWLS Director and ILS/ILL Consultant meet annually to review meeting schedule and effectiveness.		

Objective 3.4 *SWLS will coordinate routine maintenance of the shared catalog and patron databases*	ILS/ILL Consultant and Cataloger	Ongoing	Resources include staff time; can include subscription to Backstage Authority Control Services.	Backstage service paid for through LSTA Cooperative Cataloging grant through 2025; $2,000-$5,000 annually from 2026 and beyond.	ILS/ILL Consultant and Cataloger manage a maintenance tracking document.		
Objective 3.5 *SWLS will coordinate regular evaluation to ensure that the ILS meets member library needs*	ILS/ILL Consultant, with SWLS Director, Cataloger, and member libraries	2025	Resources include ILS evaluation tools, demos and possible travel to libraries using other ILS vendors, and meeting time.	Costs included in annual mileage/travel budget; up to $1,000 in 2025.	Evaluation report to be completed and shared by end of 2025.		

Goal 4: *Resources are shared among all SWLS libraries and other Wisconsin library systems and partners*						*Use to track goal progress*	
Objectives and Activities	**Person(s) Responsible for Ensuring Activities are Completed**	**Timeline for Completing the Objective and Activities**	**Resources Needed to Achieve Objective**	**Cost**	**Evaluation Method**	**Progress Toward Achieving Objective**	**Comments**
Objective 4.1 *SWLS will facilitate group purchasing of databases, software, and technology*	SWLS Director, SWLS Technology Committee	Ongoing	SWLS currently manages the purchase of seven shared databases using a combination of state aid, LSTA funding, and member fees. Databases offered are reviewed annually by the SWLS Technology Committee and recommendations are discussed and approved in Public Library Advisory Committee (PLAC) meetings.	We anticipate costs for this will vary over the next five years. SWLS is anticipating managing approximately $90,000 in group purchasing for various items in 2025, with much of this funding coming from member libraries.	The SLWS Technology Committee is tasked with recommendation and review of databases. IT Staff at Prairie Lakes Library System provides recommendation and review of technology and some software.		

Objective 4.2 *SWLS will emphasize and encourage collaborative collection development; open collection sharing—including local history collections—across member libraries; and encourage member library participation on committees to learn, share, and advocate on behalf of patrons*	SWLS Director, member library directors, member library staff, Technology Committee, Best Practices and Cataloging Committee	Ongoing	System and member library staff are the main resource needed for this objective. Secondary to this are strong collection development budgets at member libraries.	We do not anticipate additional costs for this activity.	SWLS member library directors reviewed committee make-up in 2024 and will plan to evaluate purposes of each committee at least every three years. SWLS will develop new committees as necessary.		
Objective 4.3 *SWLS will continue to collaborate with other library systems and partners to create cost- and resource-sharing where possible*	SWLS Director, PLLS IT Staff, Winnefox Accounting Staff, CESA 3 staff, and others as necessary.	Ongoing	Connections and people are the top resource to this goal. Secondary is funding to support work and willingness to accomplish shared resources for cost-savings.	2025 cost for support from PLLS are listed in Objective 1.1. Contracted costs for accounting support from Winnefox are contracted to be $9,000 in 2025 and $10,000 in 2026. SWLS expects to receive approximately $12,000 in funding to provide school delivery for CESA 3 in 2025.	Effectiveness of contract-based collaborations are reviewed at least every other year, if not annually, by all parties involved. Changes, including cost negotiations, will also take place throughout the life of this plan.		

Evaluation

The SWLS Director will be responsible for coordinating the overall evaluation of this plan. Evaluation will include an assessment of the extent to which goals and objectives have been met. The assessment shall include:

- Goals and objectives that have been accomplished
- Goals and objectives that have not been accomplished and the reason(s) why
- Suggestions for how unmet goals and objectives might be accomplished in the future
- Unanticipated outcomes

This plan will be reviewed annually by the SWLS Technology Committee. Any recommended revisions to the plan will be presented to the Public Library Advisory Committee for consideration and discussion and to the SWLS Board of Trustees for approval.

Any revision to this plan will include a study of the relevance of current goals and objectives, taking into consideration emerging needs and any new technologies available.

Budget – Estimated Expenditures

		2025		2026		2027	
Expenditure Source	Associated Goals	Amount	Funding Source	Amount	Funding Source	Amount	Funding Source
Budget Category 1: SWLS member libraries provide access to technology resources to help their communities meet needs related to personal goals and community priorities							
Budget Detail 1.1	PLLS to provide and improve technology support	$80,258	Approximately 70% of this cost is covered by state system aid the remaining 30% is covered by member library fees	$82,700 (estimate)	We expect 70% of this cost is covered by state system aid the remaining 30% is covered by member library fees	$85,250 (estimate)	We expect 70% of this cost is covered by state system aid the remaining 30% is covered by member library fees
Budget Detail 1.2	Maintain and encourage adoption of shared technology at member libraries	To be determined, based on technology needs of member libraries	Member libraries cover. We expect any costs incurred by SWLS will be covered by LSTA sparsity funds	To be determined, based on technology needs of member libraries	Member libraries cover. We expect any costs incurred by SWLS will be covered by LSTA sparsity funds	To be determined, based on technology needs of member libraries	Member libraries cover. We expect any costs incurred by SWLS will be covered by LSTA sparsity funds
Budget Detail 1.3	Prioritize the development of a new website	$7,000 (estimate)	State System Aid	$1,500 (estimate; website upkeep)	State System Aid	$1,500 (estimate; website upkeep)	State System Aid
Budget Detail 1.4	Maintaining or improving member library network access equipment	$7,000 (estimate)	LSTA Sparsity Grant funds	$7,000 (estimate)	LSTA Sparsity Grant funds	No costs anticipated	
Budget Detail 1.5	Promote and sustain systemwide Technology Reserve Grants	$3,000	Member library fees	$3,000	Member library fees	$3,000	Member library fees
Budget Detail 1.6	Explore and advise on emerging technology, trends, and tools	No costs anticipated	Consulting from PLLS included in costs listed in 1.1	No costs anticipated	Consulting from PLLS included in costs listed in 1.1	No costs anticipated	Consulting from PLLS included in costs listed in 1.1
Budget Category 2: SWLS member libraries have staff with technology expertise needed to assist patrons with their technology needs							
Budget Detail 2.1	Sponsor at least 10 hours of technology-related continuing education	Costs will vary based on content and cost-sharing agreements	State System Aid	Costs will vary based on content and cost-sharing agreements	State System Aid	Costs will vary based on content and cost-sharing agreements	State System Aid

Budget Detail 2.2	SWLS staff will complete technology-related continuing education each year	$4,000 (estimate)	State System Aid, LSTA Professional Development Funds	$4,000 (estimate)	State System Aid, LSTA Professional Development Funds	$4,000 (estimate)	State System Aid, LSTA Professional Development Funds
Budget Category 3: The shared integrated library system (ILS) meets the needs of NetSouthwest member library staff and patrons							
Budget Detail 3.1	Designated liaison between ILS provider and member staff	$19,850 (estimate)	85% covered by member library fees; 15% covered by State System Aid	$20,500 (estimate)	85% covered by member library fees; 15% covered by State System Aid	$21,250 (estimate)	85% covered by member library fees; 15% covered by State System Aid
Budget Detail 3.2	ILS/ILL Consultant will maintain working knowledge of ILS and advise on updates	*Included in 3.1*	*Included in 3.1*	*Included in 3.1*	*Included in 3.1*	*Included in 3.1*	*Included in 3.1*
Budget Detail 3.3	Best Practices committee will meet at least twice a year	No costs anticipated	Zoom license is included in general overhead costs	No costs anticipated	Zoom license is included in general overhead costs	No costs anticipated	Zoom license is included in general overhead costs
Budget Detail 3.4	Coordination of routine maintenance of shared catalog and patron databases	No costs anticipated	Covered by LSTA grant through 2025	$5,000 (estimate)	Member library fees	$5,000 (estimate)	Member library fees
Budget Detail 3.5	Coordinate regular evaluation to ensure ILS meets member library needs	$1,000 (estimate)	State System Aid	$1,000 (estimate)	State System Aid	$1,000 (estimate)	State System Aid
Budget Category 4: Resources are shared among all SWLS libraries and other Wisconsin library systems and partners							
Budget Detail 4.1	Facilitate group purchasing of databases, software, and technology	$90,000 (estimate)	Member library fees, LSTA funding, if applicable	$95,000 (estimate)	Member library fees, LSTA funding, if applicable	$100,000 (estimate)	Member library fees, LSTA funding, if applicable
Budget Detail 4.2	Encouraging collaborative collection development, open collection sharing, and committee participation	No costs anticipated	N/A	No costs anticipated	N/A	No costs anticipated	N/A

Budget Detail 4.3	Collaborate with other library systems and community partners to create cost- and resource-sharing	Expenses: $9,000 *Note: expenses for PLLS are included in 1.1* Income: 12,000 (estimate)	Expenses, member library feeds, state system aid, LSTA funds, if available Income: CESA 3 delivery contract	Expenses: $10,000 *Note: expenses for PLLS are included in 1.1* Income: 12,000 (estimate)	Expenses, member library feeds, state system aid, LSTA funds, if available Income: CESA 3 delivery contract	Expenses: $11,000 *Note: expenses for PLLS are included in 1.1* Income: 12,000 (estimate)	Expenses, member library feeds, state system aid, LSTA funds, if available Income: CESA 3 delivery contract
Totals		*$221,108*		*$229,700*		*$232,000*	

Policies

Check the following system policies which are in place. For each checked policy, append the policy to this document or provide a direct link. The Division is not requesting new development of these policies as part of the Technology and Resource Sharing plan process.

- ☐ Technology concerns for inclusive services
- ☐ CIPA/Internet safety/acceptable use policy
- ☐ Copyright (including copyright of digital formats)
- ☒ Materials selection and materials reconsideration (See Appendix C.)
- ☐ Interlibrary loan and resource sharing
- ☐ AI use and risk management

Note: Southwest Wisconsin Library System does not have a specific policy for interlibrary loan and resource sharing, but we have adopted the Wisconsin statewide guidelines.

Appendix A: SWLS Technology Services

Network Equipment at Lakeshores Library System Head-End

SWLS-owned equipment:
(1) Dell PowerEdge R450 (jointly owned with Prairie Lakes Library System) – houses SERVER01, Deep Freeze server, LibreNMS (for network monitoring), UniFi controller (for wireless configuration), UISP controller (for switch configuration), WSUS server (for Windows Update management), wireless stat server, pfSense firewall and PaperCut
(1) Ubiquiti EdgeRouter Pro – core router

PLLS equipment utilized:
(1) Ubiquiti EdgeSwitch 24 Lite (4 ports for 1G network equipment connection)
(1) Ubiquite EdgeSwitch 16 XG (2 ports for 10G network equipment connection)
(1) Dell PowerEdge R630 (storage server for backups; SWLS backups occupy 4.0T/available 64T)
(1) Cisco ASR 920 WiscNet router
(1) APC SMT3000RM2UC UPS
(1) 20 kW Kohler generator

LLS also includes SWLS backups in off-site Amazon S3 backup.

Network services include: network and device monitoring, off-site storage of electronic items on server, Deep Freeze software and administration, Windows and MS Office updates, as well as other services per support agreement and on a case-by-case basis.

The network is currently supported by the Prairie Lakes Library System (PLLS). Our main contact is Jim Novy. PLLS technology support staff have a variety of methods for contact – online helpdesk, direct email, and telephone. There is also a phone number for libraries to report internet outages or similar technology emergency situations.

The telecommunication backbone for our wide area network is provided by the TEACH Network. BCN is run by the Department of Administration which contracts with AT&T for service. The TEACH network is responsible for the fiber lines up to and including their switch at each location. PLLS employs alternative support solutions for locations not participating in the TEACH network.

Mobile Tech Support

Troubleshooting and maintenance is provided for library computers by the PLLS tech support team. Initial setup required for new computers to function properly with network services is also provided. In addition to responding to technology problems, the PLLS team also consults with SWLS libraries about plans and best solutions involving technology.

Integrated Library System—NetSouthwest Consortium

Our integrated library system is VERSO by Auto-Graphics. This software provides automated checking in and out of library materials, an online catalog of library holdings, and remote access to the patron and bibliographic record databases. The software can generate statistical reports on circulation, holdings, and patron information. VERSO includes an OverDrive API, to integrate the WPLC digital library into our collection.

The software is hosted by Auto-Graphics as part of the Software as a Service agreement (SaaS).

Appendix B: List of NetSouthwest Member Libraries

Argyle Public Library
401 E. Milwaukee
Argyle, WI 53504

Barneveld Public Library
107 W. Orbison
Barneveld, WI 53507

John Turgeson Library
220 Mound Ave.
Belmont, WI 53510

Benton Public Library
48 W. Main
Benton, WI 53803

Blanchardville Public Library
208 Mason
Blanchardville, WI 53516

Bloomington Public Library
453 Canal St.
Bloomington, WI 53804

Hildebrand Memorial Library
1033 Wisconsin Ave.
Boscobel, WI 53805

Eckstein Public Library
1034 E. Dewey
Cassville, WI 53806

Cobb Public Library
109 S. Mifflin
Cobb, WI 53526

Cuba City Public Library
108 N. Main
Cuba City, WI 53507

Johnson Public Library
131 E. Catherine
Darlington, WI 53530

Brickl Memorial Library
500 East Ave.
Dickeyville, WI 53808

Dodgeville Public Library
139 S. Iowa St.
Dodgeville, WI 53533

Dwight T. Parker Public Library
925 Lincoln Ave.
Fennimore, WI 53808

Gays Mills Public Library
16831 STH 131
Gays Mills, WI 54631

Hazel Green Public Library
1610 Fairplay
Hazel Green, WI 53811

Schreiner Memorial Library
113 W. Elm
Lancaster, WI 53813

Allen-Dietzman Public Library
220 W. Barber Ave.
Livingston, WI 53554

Lone Rock Community Library
234 N. Broadway
Lone Rock, WI 53556

Mineral Point Public Library
137 High St.
Mineral Point, WI 53565

Montfort Public Library
102 E. Park
Montfort, WI 53569

Muscoda Public Library
400 N. Wisconsin
Muscoda, WI 53573

Platteville Public Library
225 W. Main
Platteville, WI 53818

Prairie du Chien Memorial Library
125 S. Wacouta Ave.
Prairie du Chien, WI 53821

Brewer Public Library
325 N. Central
Richland Center, WI 53581

McCoy Public Library
190 N. Judgement
Shullsburg, WI 53586

Soldiers Grove Public Library
102 Passive Sun Dr.
Soldiers Grove, WI 54655

Viola Public Library
137 S. Main
Viola, WI 54664

Appendix C: Collection Development and Materials Reconsideration Policies

Southwest Wisconsin Library System
Collection Development and Circulation Policy

Approved by SWLS Board of Trustees, 11/15/2023

Objectives

The Southwest Wisconsin Library System is one of 15 public library systems in Wisconsin. It provides a diversity of resources to the member libraries in its five-county service area. This increases the types and quality of services that the region's 28 public libraries (and 2 branches) offer to the people of Crawford, Grant, Iowa, Lafayette, and Richland Counties.

Due to limitations of budget and space, the library system must have a selection policy with which to meet member library interests and needs. The SWLS Collection Development Policy is used by the system director and staff in the selection of materials and to codify guidelines for lending, and serves to acquaint users with the principles of selection and resource sharing. The policy's scope is limited to items in the SWLS Headquarters collections and not those found in member libraries, digital libraries, or other databases.

The Library Bill of Rights and The Freedom to Read Statement have been endorsed by the Southwest Wisconsin Library System of Trustees and are integral parts of the policy.

The SWLS Collection Development Policy will be reviewed and/or revised as the need arises.

Responsibility for Selection

The ultimate responsibility for selection of library system materials rests with the library system director who operates within the framework of the policies determined by the Southwest Wisconsin Library System Board of Trustees. This responsibility may be shared with other members of the system staff, with member library staff, or with contracted partners; however, because the system director must be available to answer to the system board and the general public for actual selections made, the system director has the authority to reject or select any item.

Criteria for Selection

SWLS collections can be categorized into two general areas: those materials that will belong to rotating collections and intended for patrons as the end users, and those materials intended for use by library staff and other institutions. The library system director, staff, and partners use their training, knowledge, and expertise along with criteria based on the type of collection to select items for the collection.

Selection for rotating collections will be determined by the individual collection's procedure guides. Demand, relevance, budget, space, and merit will all be considered.

Professional reference materials, programming and outreach kits, technology, and other equipment are all intended for use by libraries and library staff. Selection will be determined by the following criteria:

1. Individual merit of each item and ability to maintain said item
2. Popular appeal, continued demand, and potential longevity
3. Relevance of content to librarianship, member libraries, and library staff, including materials that challenge current ideas or promote new or alternative perspectives
4. Professional reviews and attention
5. Relation to existing collections and activities
6. Budget and space limitations

Suggestions for collection additions from system staff, member libraries, or other local institutions will be considered. Final responsibility for selection rests with the system director.

Interlibrary Loan

Because of its intended role as well as limited budget and space, the library system cannot provide all materials that are requested. Therefore, interlibrary loan (ILL) is used to obtain from other libraries those materials that are beyond the scope of the system's collections.

In return for utilizing ILL to satisfy the needs of our patrons, the Southwest Wisconsin Library System agrees to lend like materials to other libraries through the same interlibrary loan networks, and to make an effort to have its current holdings listed in a tool or tools accessible by other libraries across the state.

Gifts and Donations

The system may accept gifts of books, equipment, and other physical or electronic materials with the understanding that such will be added to the collection only if appropriate and needed. If they are not needed because of duplication, condition, dated information, or changing needs of the system, the system director can dispose of gifted items as they see fit; items will not be returned to the donor. The same criteria of selection which are applied to purchased materials are applied to gifts. It is desirable for gifts of or for specific titles to be offered after consultation with the system director. For undirected gifts or donations, selection will be made by the director if no specific purchase is requested. The Southwest Wisconsin Library System encourages and appreciates gifts and donations.

The system is not allowed to appraise the value of donated materials, though it can provide an acknowledgment of receipt of items if requested by the donor.

Weeding

An up-to-date and useful collection is maintained through a continual withdrawal and replacement process. Replacement of worn volumes is dependent upon current demand, usefulness, more recent acquisitions, and availability of newer editions. Replacement of aging or outdated technology is dependent on level of demand, budget, and usefulness. This ongoing process of weeding is the responsibility of the system director, system staff, and partners, and is authorized by the Board of Trustees.

Withdrawn materials will be handled in a similar manner and under the same authority as donated materials.

Request for Reconsideration

The Southwest Wisconsin Library System assures free access to both physical and virtual programs and materials that reflect diverse community interests and multiple points of view. Users are free to select or reject materials and programs for themselves. Responsibility for the material read by children rests with their parents or legal guardians. Selection of materials for the collections will not be inhibited by the possibility that materials may come into the possession of children.

Library users may express concerns about materials in the system collection to staff. System staff will attempt to resolve concerns as they occur.

If necessary, staff will proceed with a formal request for reconsideration process by giving the concerned individual a Request for Reconsideration Form. These requests must be limited to items owned by SWLS, and may not include items held by member libraries or which appear in online catalogs. Completed Request for Reconsideration Forms are submitted to the System Director for review. The System Director will investigate reconsideration requests from individuals who are both active (not expired) Southwest Wisconsin Library System cardholders and residents of the system's member counties (Crawford, Grant, Iowa, Lafayette, and Richland). Anonymous requests will not be accepted, and an individual may only have one active request for reconsideration at any time.

The System Director reviews requests for reconsideration, then contacts the individual with a resolution. If the situation remains unresolved, it may be appealed to the System Board. System Board decisions are final.

The Southwest Wisconsin Library System does not withdraw or restrict access to materials without following the request for reconsideration process.

Registration and Circulation

All borrowers must be registered and must have a valid patron or institution card to borrow library materials. Applicants under 16 years of age must have a parent or guardian give their consent on the application form before a new card can be issued. This parental signature is not required for children who are renewing cards.

SWLS primarily loans collection materials and equipment directly to institutions including schools and member libraries. Institutions which would like an institutional card through SWLS should provide written agreement from administration that they agree to be liable for any applicable damage or replacement fees. Materials cannot be checked out until a library card is issued.

All library cards expire. To renew a library card, patrons must produce identification and clear all outstanding fines or bills. Institutions must update contact information and clear outstanding fines or bills.

Rotating collection materials and professional reference materials may be requested and checked out by individual patrons. Programming and outreach kits, technology, and equipment may only be requested and checked out to member libraries and other local institutions.

Lost cards

In case of a lost or missing library card, SWLS Headquarters patrons and institutions should reach out to the SWLS ILS/ILL Consultant. Patrons of member libraries should contact their home libraries directly.

Loan periods and renewal limits

Cardholders may check out as many items at a time as they choose. However, some formats held by SWLS headquarters have checkout limits because of demand and total number of items available. Borrowing privileges are withheld when more than two items are considered lost or there are fines and fees in excess of $100 on the account.

The System Director may change loan periods for special collections, materials which are temporarily in great demand, or materials added to the collection which are in a new or different format.

Professional reference materials and rotating collection materials may be renewed up to three times if there are no outstanding reserves. Programming and outreach kits, technology, and equipment may be renewed once if there are no outstanding reserves.

See Appendix A for a schedule of loan periods for SWLS Headquarters materials.

Reserves

Reserves may be placed online, via email, or by phone. Patrons will be notified when the materials are available or, for institutions which receive SWLS delivery, materials will be delivered to that location. There is no charge to the patron for placing a reserve or for interlibrary loan services.

Fines and Fees

SWLS does not charge overdue fines, but prompt return of borrowed materials is requested and expected. Items overdue by more than 30 days are considered lost materials and subject to replacement fee billing.

Lost, Missing, and Damaged Materials

A replacement fee, which is listed in the item record, will be charged for all lost items. Refunds will be issued if a paid item is returned in good condition with the receipt within 30 days of payment.

If materials are damaged so as to be judged by the system or member libraries as being unsuitable for the collection, the borrower is responsible for the replacement cost.

For rotating collections, refer to the Collection Procedure document for each collection.

For programming and outreach kits, technology, and other equipment, the borrower is responsible for all parts and pieces included in the kit. Total replacement value is listed in the item record. The System Director has the discretion to charge for only parts that need replacement if that is a feasible option. A bill itemizing costs can be made available upon request.

Prompt payment of any outstanding fees is necessary to ensure continued borrowing privileges.

Appendix A: Loan Schedule for SWLS Materials

Collection	Loan Period
Programming and Outreach Kits	4 weeks (28 days)
Technology and Equipment	4 weeks (28 days)
Rotating Collections	Follow Current Library Loan Periods
Professional Reference Materials	4 weeks (28 days)

Southwest Wisconsin Library System
Request for Reconsideration of Collection Material

Only active cardholders of SWLS libraries who are residents of Crawford, Grant, Iowa, Lafayette, or Richland Counties may request reconsideration of SWLS-owned material. Only materials physically owned by SWLS may be reconsidered under SWLS board policy.

Full Name: _____

Address: _____

City: _____ **State:** _____ **ZIP:** _____

Phone: _____ **Email:** _____

Library Card Number: _____

SWLS collection material on which you are commenting:

☐ Audio Material ☐ Magazine

☐ Book ☐ Video Material

☐ Other: _____

Title: _____

Author/Artist/Publisher/Producer: _____

1. What brought this resource to your attention?

2. To what do you object? Please be as specific as possible.

3. Have you read or listened or viewed the entire content? If not, what parts did you review?

4. For what age group would you recommend this material?

5. In what ways does this material fail to adhere to the SWLS Collection Development Policy, the Library Bill of Rights, or the Freedom to Read statements?

6. In its place, what material of equal or better quality would you recommend? Please include titles as well as professional reviews.

7. What do you want the library system to do with this resource?

Signature **Date**

Patrons have the right to voice opinions about materials selected by SWLS for the collection. The system director reviews completed and signed requests for reconsideration, then contacts the individual with a resolution. If the situation remains unresolved, it may be appealed to the system board. System board decisions are final.

Form approved by SWLS Board:
11/15/2023

STAFF USE ONLY

Date Received: _____ Received by (staff name): _____

Director response date: _____