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**GENERAL INFORMATION**

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Library System

Lakeshores Library System

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Describe demographic, economic, and other facts about your system that influenced the development of this and other system plans.

Currently available data show that the combined population of the Lakeshores Library System service area is roughly 286,300 people. About 195,400 people live in Racine County, while about 90,900 live in Walworth County. Roughly half of the LLS service population are residents of municipalities which maintain libraries, while the other half are residents of municipalities which do not.

Most of the communities within the LLS service area are rural communities, or bedroom communities of the greater Milwaukee area, or communities that have a strong seasonal component to their population. As a result, a significant challenge faced by the LLS member libraries is a comparatively low tax base that exists in the gap between the two urban centers of Milwaukee and Chicago. As the costs for services, library materials, electronic resources (such as ebooks and audiobooks), etc. continue to increment upward at 3%-5% annually, funding from municipal and county sources have remained relatively flat. In a number of cases, municipalities have decreased library budgets. The resulting "pinch" for the affected libraries tends to impact public services in the forms of reduced staff, fewer hours open to the public, a reduced collections budget, or all three.

For most LLS member libraries, county payments for library services to county residents of municipalities which do not maintain libraries remains a critical component of their operating budgets. LLS is fortunate to have strong partners in the governing boards of both member counties, which have expressed strong commitments to maintaining robust library services for citizens of the service area. As an example of this, the Racine County Board of Supervisors approved a Plan of Library Service for Racine County in August of 2016. This plan both articulates how library services are to be provided in the county, and improves the formula by which services to residents of municipalities which do not maintain a library are funded. Walworth County also continues to express strong support for library services, and supports LLS in seeking to expand partnerships and innovate in new areas in order to make positive impacts on the bottom lines and service outcomes of the members.

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

As in previous years, the main challenge faced by LLS is to meet the needs of the member libraries in an environment of limited resources. While LLS provides the core services articulated in State statutes (delivery, inservice, resource library services via a contract, etc.), the system also strives to identify and provide other necessary services that the member libraries need. For example, LLS provides administration and logistical support for the Integrated Library Automation System underpinning the SHARE Consortium (which now serves Kenosha County in addition to Racine and Walworth Counties). LLS also provides a local IT service that is heavily used by all but one of the member libraries. Translating the member libraries' additional service needs into innovative "real world" service models (and then deploying those services in a frugal environment) is, perhaps, one of the most significant challenges faced by Wisconsin's 17 regional public library systems in general.

In 2016, LLS relocated its system office to a new facility. The new facility has less square footage, but has a larger meeting & instruction area, and costs quite a bit less to rent and maintain on an annual basis. Combined with an outsourcing of delivery sorting operations to the Racine Public Library, and relocation of the system computer server and head-end routing equipment to a member library, LLS achieved some budget flexibility. It is expected that this new arrangement will carry forward through 2017.

In June of 2016, LLS worked to facilitate the entry of the Kenosha Public Library and Kenosha Community Library into the SHARE Library Automation Consortium. As a key end-result, all library collections in the 3-county area are now searchable and shareable across the region. This project has been extremely successful. The libraries in Kenosha County now have access to a modern, feature-laden automation system. Patrons in three counties now have access to a more comprehensive and numerous collection that can better suit their needs. In regard to financial impact, all libraries involved are now spending less on automation vendor annual costs.

Moving into 2017, LLS will be exploring further partnerships with other library systems, county agencies and institutions of learning.

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


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Describe the planning environment and process under which this and other system plans were developed. Include how member libraries are involved in plan development and review and whether your systems has a formally appointed advisory committee. (List additional system planning documents with the period covered and attach any planning documents which have not previously been provided to the division.)

LLS is governed by a fifteen member Board of Trustees. Nine trustees represent Racine County, and six represent Walworth County. The LLS Board meets at least six times per year (every other month), with additional meetings as necessary. The Board operates a number of standing committees, including an Executive Committee, a Finance Committee, a Long-Range Planning Committee, and a Personnel Committee. The Board President serves as an ex-officio member of each committee. The LLS Board operates pursuant to Chapter 43 of the Wisconsin State Statutes, and within the confines of state, federal, and local open meetings laws.

To advise the Board, a Librarian Advisory Council (LAC) meets each month to discuss issues related to system services and advises the LLS Board. One LLS Board member serves as liaison to the LAC group, attending meetings and serving as a communication bridge between the two bodies. The LAC often establishes task forces to investigate, plan or operate collaborative services among LLS member libraries.

To govern the SHARE Automation Consortium, LLS assisted in development of an autonomous governance mechanism for the partnership, taking the form of a SHARE Directors Council. Supported by a dedicated set of bylaws (which were developed and ratified by each library participating in SHARE), the SHARE governance mechanism is designed to be operated with the assistance of significant staff resources from LLS, but also has the ability to become completely stand-alone if circumstances should some day require it. As an additional benefit, this flexible system allows non-LLS member libraries to join SHARE, as exemplified by the recent expansion of SHARE to include the two main public libraries in Kenosha County. It is hoped that the SHARE Consortium will prove its sustainability over the coming years, to the extent that other libraries or library systems wish to join.

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**ASSURANCES**


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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 2017. Indicate, with a check, your system's intent to comply with each system requirement and provide the requested information under each system requirement.

**S.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**

- (a) Written agreements that comply with s. 43.15(4)(c)4. with all member libraries.
- A copy of the agreement with a list of all members signing and the dates signed provided to the division by January 15.

**Resource Library Agreement**

- (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.
- A signed copy of the resource library agreement will be provided to the division by January 15.

**Reference Referral, Interlibrary Loan, and Technology**

- S.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.**

LLS continues to make use of the NCIP communication protocol to link the SHARE online catalog with the WISCAT catalog, seamlessly allowing patrons to place holds in WISCAT if they are unable to find what they are looking for in the online catalog of the SHARE Consortium. We continue to make electronic ebooks and audiobooks licensed through the statewide OverDrive collection available directly through the SHARE Consortium online catalog.

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

LLS also continues to re-evaluate and, where applicable, expand the depth and breadth of the local IT service. Current auxilliary technology initiatives include a 3d printer loan program (supported by LSTA grant funding), and an "Open Source People Counter" project, so that libraries can do spatial use studies or simply count the number of library visits on a daily/weekly/monthly/yearly basis.

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**ASSURANCES (cont'd.)**


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**Inservice Training**

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

**List ongoing activities related to this requirement.**

LLS continues to participate with other library systems to underwrite, develop and deploy inservice training and continuing education events across the region. Again in 2016, the system participated in the SEWI Continuing Education cooperative venture with the Bridges Library System. LLS intends to participate in the fantastic cooperative again in 2017, and is currently engaged in planning activities with Bridges.

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

LLS is again attempting to increase the frequency (and predictability) of training workshops geared toward the Integrated Library System.

**List specific staff and resources dedicated to this requirement and/or contract arrangements with other libraries or systems.**

LLS maintains a dedicated line in the annual budget for Continuing Education (Inservice) activities. For 2017, we estimate an expense of roughly \$3,000. In addition to this expense, LLS IT staff offer a number of workshops over the course of the year that are geared toward the SHARE Library Automation System that is administered and maintained by LLS.

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**Delivery and Communication**

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

**List ongoing activities related to this requirement.**

As always, LLS provides email accounts (plus necessary administration and support for email), a Wide Area Network, and a system-wide van delivery service for physical materials.

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

In late 2016, LLS began splitting the costs of a daily (5 days per week) delivery link route between the Kenosha Public Library and the Racine Public Library. This link serves as the connection point through which materials being transferred between the two systems flow, and is a result of the KCLS member libraries joining the SHARE Consortium. LLS and KPL split the costs of the delivery link "50/50". The expense to LLS is roughly \$10,000 per year.

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**Service Agreements**

- S.43.24(2)(g) Service agreements with all adjacent library systems
- A copy of the agreement with adjacent systems with a list of all systems signing the agreement will be provided to the division by January 15.
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**Other Types of Libraries**

- S.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. A copy of the agreement with a list of all signing libraries will be provided to the division by January 15.
- Other types of libraries in the system area have had an opportunity to review and comment on the plan.
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**Library Technology and Resource Sharing Plan**

- S.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.
- Member public libraries and other types of libraries in the system area have had an opportunity to review and comment on the plan.
- By January 1, 2017, the system's current plan for library technology and resource sharing or changes to the current plan will be submitted to the division.
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**ASSURANCES (cont'd.)**


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**Professional Consultation**

- S. 43.24(2)(h) Professional consultant services to participating public libraries.

**List ongoing activities related to this requirement.**

LLS offers a wide range of consulting services to its member libraries. Most of the consulting that occurs is in response to specific questions or "ad hoc" initiatives. Recently, LLS has received a large number of requests to attend local library board meetings and municipal board meetings, mostly in order to answer questions in regard to board best practices and library funding. LLS staff will again serve in these capacities in 2017. The following are areas in which consulting services are available to member libraries:

- Budgeting & Administration
- Personnel & Management
- Childrens, YA & Special Needs
- General Technology & Technology Planning
- SHARE Integrated Library System Support, Use & Best Practices
- Annual Library Work Flow Analysis Visits & Projects
- Interlibrary Loan Mediation & Best Practices
- Support for Advocacy Activities and Fundraising Campaigns
- Support for Making the Best Use of Funding Sources
- Curation, Presentation and Interpretation of Library Data & Demographics

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

LLS continues to wait for its new analytics platform to become practically usable - largely on the part of the SHARE automation vendor. It is anticipated that a more extensive rollout of the platform will occur in 2017. Also anticipated in 2017, a number of member libraries are facing the need to hire a new director, following retirements. LLS has already received requests to assist the local library boards with these projects, and we look forward to assisting in this area moving through 2017.

**Indicate specific methods or means of communication with member libraries to fulfill this requirement.**

Specific methods and means most typically include A) one-on-one meetings with library directors, B) small-group meetings with library staff, C) group meetings with library or municipal boards, D) phone and email communications with groups of varying sizes and constitutions.

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**Services to Users With Special Needs**

- S.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.

**List ongoing activities related to this requirement.**

LLS provides access to consulting services in this area, and is able to pursue related grants and funding opportunities for member libraries upon request.

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

LLS may be working with one or more libraries to secure grant funding for new doors with an assist mechanism for citizens with a wheelchair or other disability.

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**Other Service Programs**

S.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 programs 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.)

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**Administration**

- The system will not expend more than 20 percent of the state aid projected to be received in the plan year for administration.
- The 2016 system audit will be submitted to the division no later than September 30, 2017.
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**ASSURANCES (cont'd.)**

**Budget**

A copy of your public library system budget by service program category and fund source for the plan year (see attached guidelines) is attached.

**COLLABORATIVE ACTIVITIES**

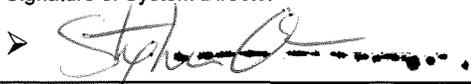
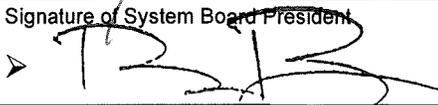
Summary of Activities *Briefly describe collaborative activities with other libraries, public library systems, and other organizations. Exclude services and activities listed in the system's 2017 resource library contract.*

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

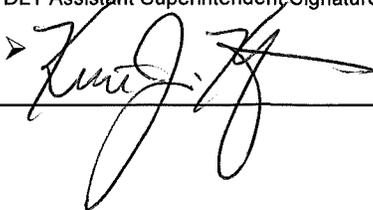
Activity	Amount
1. Participation in statewide OverDrive Media Buying Pool	\$1,150,000
2. Savings to LLS Member Libraries as result of expansion of the SHARE Consortium - not including savings to KCLS Member Libraries (Kenosha County Library System)	\$31,132
3. Participation in SEWI Continuing Education Cooperative Program (Bridges Library System)	\$13,000
4. Participation in 1000 Books Before Kindergarten App Program (Bridges Library System)	\$10,000
5. 1000 Books Before Kindergarten MailChimp Automation (Arrowhead Library System)	\$2,500
6. Great Outdoors @ Your Library Program (Arrowhead Library System)	\$5,000
7. Gale Courses Project (Collaboration with workforce development agencies of LLS member counties)	\$26,788
8.	
9.	
10.	
<b>Cost Benefit Total</b>	<b>\$1,238,420</b>

**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 2017.

Name of System Director Stephen R. Ohs	Signature of System Director 	Date Signed 9.20.2016
Name of System Board President Brian Broga	Signature of System Board President 	Date Signed 9.20.2016

**FOR DPI USE  
LIBRARY SYSTEM PLAN APPROVAL**

Pursuant to Wis. Statutes, the plan contained herein is: <input checked="" type="checkbox"/> Approved <input type="checkbox"/> Provisionally Approved See Comments. <input type="checkbox"/> Not Approved See Comments.	DLT Assistant Superintendent Signature 	Date Signed 11-8-16
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Comments

PUBLIC LIBRARY SYSTEM 2017 ANNUAL PROGRAM BUDGET					
Program	2017 Public Library System Aid	System Aid Carryover and Interest Earned	Other State and Federal Library Program Funds	All Other Income	Total
<b>Technology, Reference and Interlibrary Loan*</b>					
1. Reference, SkyRiver	\$5,000			\$30,285	
2. Automation	\$175,657			\$147,391	
3. WAN, Technology	\$104,354	\$4,000	\$14,400	\$14,300	
4. Electronic Resources	\$5,059			\$125,552	
<b>Program Total</b>	<b>\$290,070</b>	<b>\$4,000</b>	<b>\$14,400</b>	<b>\$317,528</b>	<b>\$625,998</b>
<b>Continuing Education and Consulting Service*</b>					
1. CE, Workshops	\$6,000				
2. Consulting Services	\$46,367				
<b>Program Total</b>	<b>\$52,367</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$52,367</b>
<b>Delivery Services</b>	<b>\$108,223</b>			<b>\$24,033</b>	<b>\$132,256</b>
<b>Library Services to Special Users</b>	<b>\$9,006</b>				<b>\$9,006</b>
<b>Library Collection Development</b>	<b>\$600</b>			<b>\$6,282</b>	<b>\$6,882</b>
<b>Direct Payment to Members for Nonresident Access</b>				<b>\$3,450,483</b>	<b>\$3,450,483</b>
<b>Direct Nonresident Access Payments Across System Borders</b>				<b>\$517,750</b>	<b>\$517,750</b>
<b>Library Services to Youth</b>	<b>\$38,206</b>				<b>\$38,206</b>
<b>Public Information</b>	<b>\$23,534</b>				<b>\$23,534</b>
<b>Administration</b>	<b>\$99,810</b>				<b>\$99,810</b>
<b>Subtotal</b>	<b>\$279,379</b>	<b>\$0</b>	<b>\$0</b>	<b>\$3,998,548</b>	<b>\$4,277,927</b>
<b>Other System Programs</b>					
1. Designated Fund Reserve	\$15,900				\$15,900
2.					\$0
<b>Program Total</b>	<b>\$15,900</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$15,900</b>
<b>Grand Totals</b>	<b>\$637,716</b>	<b>\$4,000</b>	<b>\$14,400</b>	<b>\$4,316,076</b>	<b>\$4,972,192</b>

\* 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 4 is reserved for the amounts budgeted for electronic resources (see Program Budget Guidelines).