



## GENERAL INFORMATION

Library System

Lakeshores Library System

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

Demographic and economic trends in the Lakeshores Library System (LLS) service area have, over the past year, remained stable. However, the Eastern portion of the LLS service area may experience significant changes over the next 1-5 years as a result of the Foxconn development project currently under way. The population of the entire system area is around 300,000 residents. About two thirds (200,000) are residents of Racine County, and one third (100,000) are residents of Walworth County. Also demographically consistent is the fact that roughly half of the resident population of the system area live in municipalities that do not maintain their own libraries. This factor means that county reimbursement for services provided to county residents without a municipal library is particularly vital to the LLS member libraries. In other words, a majority of the LLS member libraries derive over half of their annual operating budget from county reimbursement, which means that the loss of county reimbursement would have an immediate and catastrophic effect on the provision of services to residents of the LLS area. The LLS service area sits in a largely rural "pocket" between the large urban regions of Chicago and Milwaukee, and includes a number of communities with a significant seasonal residency aspect. This translates into a comparatively low tax base, which can occasionally be an additional limiting factor in areas such as service development, capital improvements and staff salary and benefit levels. Regardless of these challenges our member libraries - as always - continue to pursue innovative solutions.

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

There are a number of projects and events that are either currently influencing, or will soon influence, the system planning process at LLS.

The Arrowhead Library System (ALS) - which serves Rock County - went live within the SHARE consortium in January of 2018. This brings the consortium to a total of 31 sites (LLS member libraries, Kenosha Public Library branches, Community Library branches, and the ALS member libraries. This has expanded economies of scale, and driven costs down. It has also enhanced resource sharing across the four county service area that SHARE encompasses. Related to this project, LLS has expanded our technical staff team to accommodate the increased size of the membership.

The Public Library System Redesign (PLSR) project continues to play a significant role in system planning process, even if potential outcomes are currently unknown. Thus far, the main impact of PLSR on system planning has remained hypothetical: LLS recognizes the need to be flexible - both in mindset and budgeting. LLS is moving forward with projects, partnerships, and service delivery to the best of our ability, while keeping in mind that the PLSR project may result in changes to how regional services are offered in Wisconsin.

LLS is also continues to follow the process of locating a large scale Foxconn production facility within our service area. If constructed, it is possible that this facility will become a significant driver of demographic and economic change - and bring with it an expansion in need for public library services in the area. If this occurs, LLS will be poised to work with our member libraries to devise efficient, effective methods and means to meet these new needs. One specific factor that may require more immediate attention is the intersystem agreement that exists between Kenosha County Library System and LLS. Specifically, the rates and conditions of reimbursement may need adjustment.

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 system has a formally appointed advisory committee. If an advisory committee is appointed under Wis. Stat. § 43.17(2m), how are appointments made, meetings posted, and how does the committee report to the board? (List additional system planning documents with the period covered and attach any planning documents which have not previously been provided to the division.)

Member libraries are frequently solicited for feedback and advice throughout the year in regard to specific programs and initiatives that become woven-in to the ongoing continuum of planning at LLS. During the latter months of 2018, the LLS Administrator performed a round of in-depth library visits, in part to assess the strengths, weaknesses and opportunities for future planning at LLS. In addition, system staff are preparing to conduct an "importance/effectiveness" survey, both to compare with a similar survey that was done in 2016 and add some additional measures for planning purposes. The existence of a Librarian Advisory Council (LAC) is enshrined in the system bylaws, and meets on a monthly basis to engage in multiple forms of continuous planning. The LAC is specifically petitioned for feedback in regard to the system planning process each fall, prior to the composition and filing of the system plan. The plan is discussed and approved by the LLS Board of Trustees, which

	<b>GENERAL INFORMATION (cont'd.)</b>	
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meets at least six times per year. The LLS Board maintains four standing committees according to its bylaws: an Executive Committee, a Finance Committee, a Personnel Committee, and a Long Range Planning Committee. These committees collaborate over the course of each given year in ongoing planning, with a flurry of activity prior to plan development in late summer.

	<b>ASSURANCES</b>	
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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 2019. 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**

- (a) Written agreements that comply with Wis. Stat. § 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**

- 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.**

Referral of reference requests within and outside of the system is mostly handled on-demand by individual libraries. LLS staff are available to assist, but in most cases involvement of the system is unnecessary and referral happens in a direct fashion library-to-library.

Interlibrary loan requests coming from outside of the LLS member libraries are tracked and cleared by the LLS Interlibrary Loan Specialist. These activities have, in general, remained unchanged from the previous year.

**Indicate new or priority activities relating to this requirement for the plan year. If none, indicate so.**

We do not have any specific new or priority activities relating to this requirement to indicate at this time.

**Inservice Training**

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

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

As in previous years, LLS provides two main categories of activities that relate to this requirement, SHARE-related automation training, and training activities related to all other types of continuing education.

**Indicate new or priority activities relating to this requirement for the plan year. If none, indicate so.**

The chief priority for the 2019 service year will be improvement of the quality and frequency of the SHARE-related training program.

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

Primary staff resources dedicated to this requirement are the System Administrator, System IT Manager, and Technology Services Specialist. The Administrator serves as the local point-person as part of LLS's involvement in the SEWI Continuing Education cooperative. Our IT Manager and Technology Services Specialist deliver training related to the SHARE Consortium. System funding devoted to inservice training includes salary and benefits funding for personnel, and an annual funding contribution to the SEWI Continuing Education cooperative. LLS may, in the 2019 service year, see an increase in training capacity from a planned additional staff position that has been added but is as yet unfilled.

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**ASSURANCES (cont'd.)**


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**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.**

LLS provides free Google-app-based email and productivity tools to our member libraries. LLS funds 85% of the delivery infrastructure that serves the system. This includes a dedicated system delivery driver, and system membership in the statewide delivery network operated by the South Central Library System (SCLS).

**Indicate new or priority activities relating to this requirement for the plan year. If none, indicate so.**

During the 2018 service year, the delivery sorting operation was moved from Racine Public Library to VIP Services, Inc, in Elkhorn. VIP is dedicated to providing education, care and employment to people with disabilities, and has warehousing, dock, and fleet vehicle capabilities. We are proud of this partnership. One unexpected side-effect of the increased volume and shifting of sorting operations has been that our delivery van is now often overloaded and beyond capacity. We are working with our delivery vendor to address this while also remaining open to new opportunities to partner with other library systems or agencies to optimize this component of our service.

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**Service Agreements**

- Wis. Stat. § 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**

- 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. 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**

- 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.
- 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, 2019, the system's current plan for library technology and resource sharing or changes to the current plan will be submitted to the division.

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

LLS does not currently have any large scale activities related to this service area that are new. We continue to provide local IT service to our member libraries at low cost, organize group purchases of equipment, provide mobile maker kits and work with our libraries on individual technology projects with potential to positively impact other LLS members. ALS's entry into the SHARE Consortium has resulted in enhanced resource sharing across the four-county service area, so one priority activity will be to continue the process of adaptation and iteration of our technology and resource-sharing services to meet the needs of member libraries and SHARE partner libraries.

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**ASSURANCES (cont'd.)**


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**Professional Consultation**

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

**Specifically identify consultants, their service areas, and related activities.**

Consultation services are provided to a number of stakeholders. First and foremost, library directors are often our number one "customer" in need of consultation. Topics range from new building construction, to board dynamics, to seeking advice about how best to handle certain municipal political situations. We also consult with library trustees, municipal elected officials and county elected (or appointed) officials. With these stakeholders, topics most often relate to library funding, board appointments, and the county reimbursement process.

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

For the 2019 service year, we estimate that logistical, administrative, and technical aspects of new building construction (or renovation) will be a primary focus.

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

Most consulting is conducted via email and telephone, either one-off "question and answer" type communications, or multiple back and forth messaging. Often, LLS staff meet on or off site with library directors, library trustees, or county officials.

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**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.

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

A contract-based consultant position is responsible for planning and deployment of our annual storywagon program. This individual also facilitates library participation in the annual nationwide summer reading program, and serves as a point person for inquiries from our member libraries concerning other needs for additional inclusive services. LLS will more than likely fund library participation in the 1,000 Books Before Kindergarten App project in 2019. LLS also facilitates a partnership between the member libraries and workforce development agencies of both member counties to fund access to the Gale Courses learning platform for all residents of the service area.

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

Activities that will remain priorities include the storywagon program, 1,000 Books Before Kindergarten, and the Gale Courses project.

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

Member libraries engage in communication as needed using a number of regular channels, including LAC meetings. The consultant is responsible for communicating with our member libraries on many of the aforementioned initiatives. This individual also conducts wrap-up meetings at the end of each summer to assess program effectiveness and begin the planning process for the next year. The System Administrator also seeks feedback from our member libraries regarding program effectiveness and suggestions for future services or programs.

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**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.)

Lakeshores Library System continues to provide the primary technical, logistical, and administrative support for the SHARE Consortium. SHARE is primarily an automation consortium. It's mission is to provide a robust and well-managed automation system to its members. Supporting SHARE has become one of, if not the most important programs that Lakeshores Library System offers. Lakeshores offers support for SHARE as a free service to its fifteen member libraries, and support in exchange for a fee to libraries who are not members of Lakeshores (examples: ALS member libraries and KCLS member libraries).

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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 2018 system audit will be submitted to the division no later than September 30, 2019.
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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 is attached (see guidelines).

	<b>COLLABORATIVE ACTIVITIES</b>	
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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 2019 resource library contract.

LLS continues to participate in a number of collaborative activities at regional and state levels. The WPLC Digital Library continues to be extremely popular with patrons and extremely cost-effective. 1,000 Books Before Kindergarten is a clearly-beneficial partnership between a number of regional library systems, and the SEWI Continuing Education Partnership brings tremendous value to LLS from a continuing education availability standpoint. The Gale Courses Partnership with Racine and Walworth counties is also proving popular with patrons, job-seekers, and lifelong learners.

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

Activity	Amount
1. WPLC Digital Content	\$1,200,000
2. 1,000 Books Before Kindergarten Program w/ Bridges Library System	\$1,000
3. SEWI Continuing Education Partnership	\$13,000
4. Gale Courses Partnership w/ Racine & Walworth Counties	\$24,000
5.	
6.	
7.	
8.	
9.	
10.	
<b>Cost Benefit Total</b>	<b>\$1,238,000</b>

**2019 BUDGET INCREASE ACTIVITIES**

Summary of Activities *Identify any specific activities and allocations supporting broadband access, workforce development, and lifelong learning.*

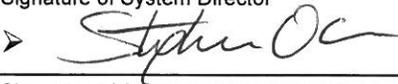
2019 budget increase dollars are currently allocated within the LLS system budget to bolster a number of programs, including an expansion of online database offerings to support both workforce development and lifelong learning. Broadband access is being supported through a number of technical research and development efforts that would not be possible without these additional funds.

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

Activity	Amount
1. Lynda.com Learning Library	\$20,000
2. Technical R&D Activities Related to Broadband and Network Efficiency	\$18000
3.	\$0
4.	\$0
5.	\$0
6.	
<b>Cost Benefit Total</b>	<b>\$38,000</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 **2019**.

Name of System Director Stephen Ohs	Signature of System Director ➤ 	Date Signed Mo./Day/Yr. 10/8/2018
Name of System Board President Robert N. Miller	Signature of System Board President ➤ 	Date Signed Mo./Day/Yr. 10/8/2018

**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 <i>See Comments.</i> <input type="checkbox"/> Not Approved <i>See Comments.</i>	DLT Assistant Superintendent Signature ➤ 	Date Signed Mo./Day/Yr. 11/13/2018
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Comments

PUBLIC LIBRARY SYSTEM 2019 ANNUAL PROGRAM BUDGET					
Program	2019 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. Technology	\$23,746	\$0	\$0	\$86,860	
2. Reference	\$0	\$0	\$0	\$0	
3. Interlibrary Loan	\$73,445	\$0	\$0	\$0	
4. Electronic Resources	\$8,000			\$127,829	
<b>Program Total</b>	<b>\$105,191</b>	<b>\$0</b>	<b>\$0</b>	<b>\$214,689</b>	<b>\$319,880</b>
<b>Continuing Education and Consulting Service*</b>					
1. Continuing Education	\$7,000	\$0	\$0	\$0	
2. Consulting	\$49,351	\$0	\$0	\$0	
<b>Program Total</b>	<b>\$56,351</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$56,351</b>
<b>Delivery Services</b>	<b>\$96,299</b>	<b>\$0</b>	<b>\$0</b>	<b>\$58,683</b>	<b>\$154,982</b>
<b>Library Services to Special Users</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>Library Collection Development</b>	<b>\$10,799</b>	<b>\$0</b>	<b>\$0</b>	<b>\$9,782</b>	<b>\$20,581</b>
<b>Direct Payment to Members for Nonresident Access</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$4,173,121</b>	<b>\$4,173,121</b>
<b>Direct Nonresident Access Payments Across System Borders</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$78,616</b>	<b>\$78,616</b>
<b>Library Services to Youth</b>	<b>\$29,200</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$29,200</b>
<b>Public Information</b>	<b>\$1,997</b>	<b>\$0</b>	<b>\$0</b>	<b>\$10,000</b>	<b>\$11,997</b>
<b>Administration</b>	<b>\$195,587</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$195,587</b>
<b>Subtotal</b>	<b>\$333,882</b>	<b>\$0</b>	<b>\$0</b>	<b>\$4,330,202</b>	<b>\$4,664,084</b>
<b>Other System Programs</b>					
1. SHARE Consortium	\$144,616	\$20,229	\$0	\$214,599	\$379,444
2. Other Programs	\$40,153	\$0	\$0	\$34,000	\$74,153
<b>Program Total</b>	<b>\$184,769</b>	<b>\$20,229</b>	<b>\$0</b>	<b>\$248,599</b>	<b>\$453,597</b>
<b>Grand Totals</b>	<b>\$680,193</b>	<b>\$20,229</b>	<b>\$0</b>	<b>\$4,793,490</b>	<b>\$5,493,912</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).