Wisconsin Department of Public Instruction
PUBLIC LIBRARY SYSTEM PLAN AND CERTIFICATION OF INTENT TO COMPLY CALENDAR YEAR 2021
PI-2446 (Rev. 08-2020)

INSTRUCTIONS: Complete and submit one copy of this Word document along with one signed, scanned copy in PDF format to the Division for Libraries and Technology (Division) by Friday, October 16, 2020. Submit completed Word and PDF documents to:

LibraryReport@dpi.wi.gov

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

GENERAL INFORMATION

Library System

Lakeshores Library System

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

The 2021 Plan for Lakeshores Library System (LLS) incorporates a number of key needs. First, it is designed to support the statutory obligations of public library systems in Wisconsin by providing the required services at a high level of quality. It is also intended to provide LLS member libraries with additional services they want - also at a high level of quality. Lastly, the plan is designed to support partnerships with other regional library systems on initiatives of import to the region and state.

There are a number of significant ongoing challenges that are reflected in this plan. First, a broad spectrum of member libraries - ranging from large/urban to very small/rural - require differing approaches to service. Second, a relatively sparse population density across the LLS service area results in resource/funding scarcity with regard to the formula for determining the level of state funding that LLS receives to operate. Third, an expansion of the LLS technology team in 2019 by +1 FTE (supported by contract income) creates a tighter ongoing budgeting scenario. Lastly, service delivery challenges within other public library systems have resulted in partnerships to share software, infrastructure, and provide IT services and administration for-a-fee.

The newest -and perhaps most consequential - challenge for the upcoming year will be adapting to the significant disruption presented by the COVID19 pandemic. We anticipate further disruptions to play-out in 2021 and beyond.

LLS intends to undertake a strategic planning process at some point in 2021. Prior to this, LLS will conduct a survey in order to better understand the service needs of member libraries, as well as how those needs have changed over time.

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

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

☒ Yes, the library system included member libraries in the development of this plan.

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

The system made a draft of the plan available to member libraries for comment.

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

☐ No, the library system does not have a formally appointed advisory committee.

☒ Yes, the library system has a formally appointed advisory committee.

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

The LAC (Librarian Advisory Committee) exists as a communication interface between the system and its member libraries. The LAC is outlined in the LLS bylaws. Each member library sends a representative. Meetings occur on the first Tuesday of each month (12 meetings per year). The LAC nominates and elects a chairperson on an annual basis, alternating by county. Meeting agendas and minutes are posted according to the Wisconsin open meetings law, and are archived on the LLS website. A member of the LLS board serves as a liaison between the LAC and system board, delivering updates at the meetings of each body in regard to the other body's activities.

ASSURANCES

The following plan and compliance document provides assurance that your public library system intends to comply with all statutory requirements for public library systems for calendar year **2021**. Indicate, with a check, your system's intent to comply with each system requirement and provide the requested information under each system requirement.

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

Membership Agreements

☒ Wis. Stat. § 43.24(2)(a) Written agreements that comply with Wis. Stat. § 43.15(4)(c)4 with all member libraries.

☒ The system will provide a sample copy of the agreement with a list of all members signing and the dates signed to the Division by January 15. (The system does not need to file multiple copies of the same agreement; only a sample copy of each type of agreement is necessary.)

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

https://drive.google.com/drive/u/1/folders/1C0Snb2UjIkaPDyXCXW1lk2YR8-KCfMT0

Resource Library Agreement

☒ Wis. Stat. § 43.24(2)(b) Backup reference, information and interlibrary loan services from the system resource library, including the development of and access to specialized collections, as evidenced by a written agreement with that library.

☒ The system will provide a signed copy of the resource library agreement to the Division by January 15.

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

https://drive.google.com/drive/u/1/folders/1C0Snb2UjIkaPDyXCXW1lk2YR8-KCfMT0

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:

LLS maintains an interlibrary loan clearinghouse, staffed by 1 FTE. This position also technically handles the reference routing portfolio, but in practice has not received any reference routing requests in years.

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

The ILL clearinghouse is a mature service staffed by an experienced FTE. As such, there are no significant changes expected in the coming year with respect to the clearinghouse. An extended period of closure in 2020 due to the statewide safer at home order required us to re-task the position in an ad-hoc way. An ongoing outcome of this is a heightened sense that LLS may need to re-think the long-term viability of staffing this role at the 1.0 FTE level, especially when weighted against other services our member libraries would like to have access to at the system level.

Inservice Training

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

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

List ongoing activities related to this requirement.

LLS primarily contracts with other public library systems in order to provide quality continuing education opportunities to its member libraries. Ongoing activities include in-person events and webinar-type events. Event topics are chosen on an annual basis in response to the desires expressed by member libraries.

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

The activities for 2021 are expected to be on-par with last year with regard to the number and quality of events, with one large caveat that library needs are rapidly evolving due to the effects of the COVID19 situation.

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

The LLS staffer who serves as CE coordinator and validator is Steve Ohs (sohs@lakeshores.lib.wi.us).

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

ASSURANCES (cont'd)

LLS partners with the following systems for access to CE events: Bridges Library System, South Central Library System, and Wisconsin Valley Library Service. Most agreements are informal: essentially email-based commitments to participate and fund initiatives.

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 administers a wide area network (via Wiscnet), and email domains (via Gsuite) for each member library, facilitating electronic delivery of information. LLS facilitates physical materials transfer between its member libraries by means of a contract with a vendor (currently Excell Express Messenger). Sorting hub services are provided by the Racine Public Library (RPL), supported by a significant investment by LLS to assist in funding a large automated sorting machine. The RPL sorting hub also serves as a transfer point between the delivery networks of Kenosha County Library System and Arrowhead Library System, thus linking together all of the member libraries of the SHARE Consortium.

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

In 2020, LLS helped fund the procurement of a 24 bin automated materials handler by the RPL. LLS funding provided a capital investment in the project to support upsizing of the machine in order to sort for the LLS member libraries and provide pre-sorting for KCLS and ALS system partners. As of the writing of this plan, the sorting machine has been functional for a number of months, and has provided reliable service. During the widespread 2020 library closures associated with COVID19, LLS was able to accelerate the RFID (Radio Frequency Identification) tagging of the majority of SHARE member libraries. We are now collectively to a point where the majority of items are tagged and can be processed much more expediently through the new sorting infrastructure. We anticipate wrapping up the tagging project in 2021. Further efforts in 2021 will presumably focus on refining procedures, and exploring additional ways to bring better service to patrons through the collective investment in the technology.

Service Agreements

☒ Wis. Stat. § 43.24(2)(g) Service agreements with all adjacent library systems.

☒ The system will provide a copy of the agreements to the Division by January 15. The agreements with adjacent systems – including consulting agreements, consortium agreements, etc. – must include a list of all systems signing the agreement.

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

https://drive.google.com/drive/u/1/folders/1C0Snb2UjIkaPDyXCXW1lk2YR8-KCfMT0

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

LLS maintains agreements with adjacent library systems, including Arrowhead (Rock County), Kenosha County Library System (Kenosha County), and the Bridges Library System (Jefferson and Waukesha Counties)

ASSURANCES (cont'd)

Other Types of Libraries

☒ Wis. Stat. § 43.24(2)(L) Cooperation and continuous planning with other types of libraries in the system area, which results in agreements with those libraries for the appropriate sharing of library resources to benefit the clientele of all libraries in the system area.

☒ The system will have agreements with other types of libraries, or if the system participates in a cooperation agreement with a multitype organization to meet the purposes of this goal, there is established a clear link between the system and the individual members of the multitype organization. The system will provide a copy of the agreement with a list of all signing libraries to the Division by January 15.

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

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

Library Technology and Resource Sharing Plan

☒ Wis. Stat. § 43.24(2)(m) Planning with the division and with participating public libraries and other types of libraries in the area in regard to library technology and the sharing of resources. By January 1, 2000, and every fifth January 1 thereafter, the public library system shall submit to the division a written plan for library technology and the sharing of resources.

☒ The system will provide the current plan for library technology and resource sharing to the Division by January 1, 2021, if the system amended the plan since last submitting it to the Division or if the plan on file with the Division is no longer valid. See the Library System Technology and Resource Sharing plan webpage for the most current version of the system library technology and resource sharing plan.

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

https://www2.lakeshores.lib.wi.us/technology

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

☒ Yes, the library system technology and resource sharing plan is current and comprehensive for the technology and resource sharing services the system provides.

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

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

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

The LLS tech team will continue to explore and develop further technology-based solutions to assist in meeting the ongoing challenges of a rapidly shifting service paradigm, as affected by budgets and public health imperatives.

Professional Consultation

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

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

David Dowling (Library Technology, Integrated Library System)
Vicki Keith (Interlibrary Loan, Reference)
Janice Martin (Administration, Budgets, Human Resources)
Jim Novy (Library Technology, Technology Budgets, TEACH Program, Integrated Library System)
Steve Ohs (Administration, Budgets, Municipal Relations, County Relations, Director Searches, Continuing Education).
Jennifer Puccini (Childrens & YA Services) - Burlington Public Library.

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

In 2021, we anticipate that a significant consulting topic will be helping our member libraries to cope with heightened budget pressures, both internal and external.

ASSURANCES (cont'd)

Inclusive Services

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

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

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

There are no new activities currently planned for 2021. LLS will continue to facilitate library services for users with special needs when requested by member libraries, and on an ongoing basis for job-seekers through specific online resources. We anticipate that new needs related to the economic and social effects of COVID19 will emerge, and we will seek to address those needs both on our own and in partnership with other library systems. Future development of LLS's capacity in this area will be a priority, especially with regard to building awareness of programming and services geared toward LGBTQ and BIPOC populations.

Other Service Programs

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

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

LLS' primary other service program is the SHARE Consortium. LLS continues to serve as the designated "Agency of Support" for SHARE. In this role, LLS provides fiscal agency, administrative and technical support for the consortium. In a practical sense, this means operating the integrated library system software (including local customizations), providing the fiscal structure for funding the software, and advising the SHARE Director's Council on matters relating to the ILS software and governance issues. Though LLS does not make significant direct contributions of funding to SHARE, LLS does commit substantial resources to the consortium in the form of staff salaries & benefits, as well as the opportunity cost of operating to a large degree beyond the scope of our core 15 member libraries.

Administration

☒ The system will not expend more than 20 percent of state aid received in the plan year for administration.

☒ The system will submit the 2020 system audit to the Division no later than September 30, 2021.

Budget

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

COLLABORATIVE ACTIVITIES

Summary of Activities *Briefly describe collaborative activities with other libraries, public library systems, and other organizations. Exclude services and activities listed in the system's 2021 resource library contract.*

LLS will maintain our key CE partnerships through 2021. We will also remain engaged with our ALS and KCLS partners in SHARE, as well as our IT service contract with the Southwest Library System.

Cost Benefit *For each activity above, list the activity name and estimated cost benefit realized.*
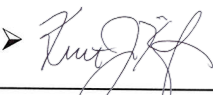
Activity	Amount
1. WPLC Digital Collection	$1,000,000
2. SEWI Continuing Education Program	$12,000
3. Library Trustee Training Week	$1,600
4. Wild Wisconsin Winter Web Conference	$3,552
5.	
6.	
7.	
8.	
9.	
10.	
Cost Benefit Total	$1,017,152

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 **2021**.

Name of System Director	Signature of System Director	Date Signed *Mo./Day/Yr.*
Stephen Ohs	*[signature]*	10/12/2020

Name of System Board President	Signature of System Board President	Date Signed *Mo./Day/Yr.*
Jane Brossard	*[signature]* Jane E. Brossard	10/12/2020

FOR DPI USE
LIBRARY SYSTEM PLAN APPROVAL

Pursuant to Wis. Statutes, the plan contained herein is:	DLT Assistant Superintendent Signature	Date Signed *Mo./Day/Yr.*
[X] Approved [ ] Provisionally Approved *See Comments.* [ ] Not Approved *See Comments.*	*[signature]*	10/28/2020

Comments

PUBLIC LIBRARY SYSTEM 2021
ANNUAL PROGRAM BUDGET

Program	2021 Public Library System Aid	System Aid Carryover and Interest Earned	Other State and Federal Library Program Funds	All Other Income	Total
Technology, Reference, and Interlibrary Loan*					
1. Technology	$42,788	$0	$0	$147,454	
2. Reference	$5,000	$0	$0	$0	
3. Interlibrary Loan	$75,558	$0	$0	$0	
4. SHARE Consortium	$206,907	$0	$0	$210,837	
5. Electronic Resources	$0	$0	$0	$151,781	
Program Total	$330,253	$0	$0	$510,072	$840,325
Continuing Education and Consulting Service*					
1. Continuing Education	$5,500	$0	$0	$0	
2. Consulting	$71,127	$0	$0	$0	
Program Total	$76,627	$0	$0	$0	$76,627
Delivery Services	$124,613	$0	$0	$18,000	$142,613
Inclusive Services	$0	$0	$0	$0	$0
Library Collection Development	$425	$0	$0	$0	$425
Direct Payment to Members for Nonresident Access	$0	$0	$0	$3,948,726	$3,948,726
Direct Nonresident Access Payments Across System Borders	$0	$0	$0	$622,195	$622,195
Youth Services	$28,000	$0	$0	$0	$28,000
Public Information	$6,710	$0	$0	$20,000	$26,710
Administration	$113,565	$13,000	$0	$0	$126,565
Subtotal	$273,313	$13,000	$0	$4,608,921	$4,895,234
Other System Programs					
1. Other Programs	$0	$0	$14,700	$34,000	$48,700
2.					$0
Program Total	$0	$0	$14,700	$34,000	$48,700
Grand Totals	$680,193	$13,000	$14,700	$5,152,993	$5,860,886

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