



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

GENERAL INFORMATION

Library System

Wisconsin Valley Library Service

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

As good stewards with limited resources, the WVLS staff and board exercise caution when planning for new/enhanced services. While the increase in state aid for 2024 is very much welcome, WVLS is challenged to reallocate resources to advance a program or improve services as inflationary increases continue to garner the lion's share of additional revenue. In previous years when funding was flat, inflationary increases meant compromises to/reductions in one or more service areas. Fortunately, the increased aid is keeping services intact.

In the last 10 years, WVLS went from 10.5 FTEs to 8.10 due to flat funding. In early 2022, WVLS was able to increase one part time position to full time, so the WVLS Team is now at 8.50 FTEs. Due to the high cost of hiring/training staff, WVLS will continue to seek interns, temporary and part-time help, and volunteers to assist with projects, and also to outsource tasks when it makes economic sense to do so. In 2024, WVLS will continue to explore ways to work more cooperatively and collaboratively with other agencies, systems and libraries for the provision of services.

In 2024, WVLS, IFLS Library System, and the Northern Waters Library Service plan to jointly hire a Technology Support Consultant under the LEAN WI collaboration. This full-time position will provide training on member library websites, assist with website functionality, act as a resource for digitization projects, and more.

Member libraries continue to think creatively and innovatively when planning services, and many continue to "do more with less." Municipal and county support remained flat in 2022. Local support of libraries increased 1.27% from 2021-2022, and county support increased .36%, both well below the rate of inflation. In 2022, the range in total operating income ranged from a low \$36,560 to a high \$4,140,658. And total operating income from 2018 to 2022 increased only 3.00% overall.

Looking at member library collection development activities, funds expended on nondigital library materials continues to remain flat (\$1,022,942 in 2019; \$940,569 in 2020, \$993,359 in 2021 and \$1,025,687 in 2022). When compared to the amount expended in 2011, \$1,142,000, the reduction and trend is more pronounced. The demand by patrons for popular materials in all formats never wanes. This demand, combined with pressures to provide digital content, stress collection development budgets and practices in large and small libraries alike. To help, WVLS initiated an OverDrive Advantage account in 2017. We routinely solicit donations from member libraries to support the collection, few libraries contribute funds to support this collection even though they have been making up an increasing proportion of library use. Total e-book, e-audio and e-video uses was 247,322 in 2018, 320,786 in 2020, and 333,352 in 2022.

Member libraries are not required to provide financial support for WVLS database subscriptions, nor for the WVLS OverDrive Advantage collection, at this time.

Ubiquitous usage of technologies to access information and to communicate, combined with the everchanging technology landscape, challenge libraries and systems to stay current with technologies used by community members and to implement technologies to enhance services. These challenges, which are most evident in rural communities where local technology support and expertise may not be readily/easily available, reinforce service priorities at the system level to proactively provide training prior to implementation of new technologies in concert with consistent, reliable, ongoing technology support when needed. Local library technology needs further remind WVLS to document procedures and standardize processes, to offer "cheat sheets" or templates for "best practices," and to create training videos (or Digital Bytes) when applicable. In 2024, WVLS will address member library needs through increasingly robust training programs and enhanced customer-driven technology consultation and support.

WVLS will again provide a Collaboration and Innovation Grant opportunity for member libraries to implement / beta test

GENERAL INFORMATION (cont'd.)

a new service with a community partner or neighboring library. Also, to assist libraries in their marketing efforts, WVLS will offer marketing grants to member libraries. Member libraries selected to participate will receive continuing education, ongoing consultation and support, and funds to support a new marketing initiative. In addition to grants for summer library program performers, WVLS will offer member libraries funds to support a new summer math programming initiative implemented in Wisconsin in 2023.

As many member libraries do not have funds to cover the continuing education needs of their staff, WVLS will again offer scholarships for area colleagues to attend such events as WLA's Library Legislative Day, WAPL and WLA conferences, as well as the Public Library Association and ALA conferences. WVLS will continue its mentorship program established in 2015, and orientation programs for new area public library staff. WVLS continues to evaluate and customize its trustee and public library director orientation programs to accommodate individual's capacity, interests and needs.

2024 will be the 26th year for V-Cat, WVLS's shared automation system. The V-Cat consortium, which consists of all 25 WVLS public libraries, assumes approximately 83% of the annual cost of this program. Similar to other WI systems – IFLS Library System, MCFLS, and NWLS – the WVLS V-Cat consortium continues to use Innovative Interfaces, Inc. for the integrated library system. The V-Cat Consortium migrated from SirsiDynix to Innovative in 2012. In 2021, WVLS signed a contract for a new Aspen Discover Layer and was able to implement uniform loan rules across all consortium libraries around that time. Innovative's activities and product developments are being closely monitored, and a Migration Committee was formed to investigate other products throughout 2022 and 2023. Additionally, in 2024 WVLS will continue to explore ways to collaborate with other systems to improve ILS administration and ILS-related services on behalf of the consortium. This is demonstrated by our participation in two 2023-2024 LSTA grant projects – a Cooperative Cataloging Project that includes WVLS and several other Wisconsin systems, and a Joint ILS Consortium Exploration Project with NWLS.

The WVLS 2024 Plan and Budget provides funds to accommodate a deeper collaboration with LEAN WI partners, and to enhance support in such areas as marketing, consulting services, digitization, technology and data literacy. This plan and budget does not support the acquisition of additional electronic content and databases at levels desired by our members, nor the opportunity to hire a full time cataloger.

WVLS continues to monitor progress on the implementation of recommendations from the Public Library System Redesign project, as they have the potential to significantly impact the 2024 plan in a myriad of ways.

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:

WVLS is governed by a 15-member Board of Trustees whose members represent Clark, Forest, Langlade, Lincoln, Marathon, Oneida and Taylor counties. The WVLS Board meets at least 6 times a year, and the Executive Committee of the Board meets when necessary. The WVLS Board has final approval on all planning, policy and budgetary documents.

The 15-member WVLS Library Advisory Committee (LAC) is a multitype group that has representatives from public, school, and academic libraries in the WVLS area. This committee meets twice annually. During its meeting in August, LAC reviews drafts of the WVLS plan and budget and provides service recommendations to the WVLS Board.

The 12-member WVLS/V-Cat Steering Committee includes six public library directors, two WVLS staff members and four members of the WVLS Board. This committee meets once or twice annually and provides recommendations on the V-Cat budget and ILS planning initiatives to the V-Cat Council and WVLS Board of Trustees.

The WVLS ILS Consortium is governed by the V-Cat Council, a body that includes a representative from each of the 25 participating public libraries. The Council meets five times a year to discuss and resolve ILS software, hardware, policy and procedural matters and to recommend budget and ILS administrative priorities to the WVLS Board of Trustees. Subcommittees of the Council, V-Cat Bibliographic Committee and Cooperative Circulation Committee, include representatives from member libraries and WVLS. They meet as necessary to research topics and best practices, and to

ASSURANCES (cont.)

develop recommendations to bring to the V-Cat Council.

The WVLS 2024 Plan and Budget was developed with input from member libraries – primarily through representation on the WVLS LAC, V-Cat Steering Committee and V-Cat Council. Feedback is also received from surveys, and during consults between WVLS staff and member library colleagues.

The WVLS Board of Trustees approves appointments to the WVLS LAC and WVLS/V-Cat Steering Committee during its meeting in November. Each body operates pursuant to Chapter 43 of the Wisconsin State Statutes, and within the confines of the WI Open Meetings Law.

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:

See above.

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 2024. Indicate, with a check, your system's intent to comply with each system requirement and provide the requested information under each system requirement.

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

Membership Agreements

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

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

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

Resource Library Agreement

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

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

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

Reference Referral, Interlibrary Loan, and Technology

Wis. Stat. § 43.24(2)(d) Referral or routing of reference and interlibrary loan requests from libraries within the system to libraries within and outside the system.

List ongoing activities related to this requirement:

ONGOING ACTIVITIES RELATED TO REFERENCE, REFERRAL, AND INTERLIBRARY LOAN

1. Ensure that interlibrary loan participants have access to accurate ILL statistics.
 2. Encourage all member libraries to subscribe to appropriate interlibrary loan communication channels.
 3. Participate in state level agreement with major book jobber(s) which allow publicly supported WVLS libraries of all types to purchase library materials at maximum discounts.
 4. Monitor statewide ILL activity and communicate relevant service changes with member libraries.
 5. Monitor usage of BadgerLink and WVLS subscription-based electronic resources provided for member libraries
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ASSURANCES (cont'd)

and patrons.

6. Provide authentication services for BadgerLink and WVLS databases offered to the public by fully utilizing vendor authentication processes where possible.

ONGOING ACTIVITIES RELATED TO TECHNOLOGY / NETWORK

1. Facilitate continued development and expansion of "LEAN Wisconsin" (LEAN WI), a technology resource sharing partnership between multiple systems, and "Libraries Win", the joint technology services platform it hosts and maintains. Maintain joint LEAN WI Library System Long Range Strategy and Operational Technology Plan.
2. Facilitate strategic growth within the LEAN WI partnership and lead efforts of technology collaboration with other library systems and organizations.
3. Maintain strategic and operational awareness of federal, state, and regional programs and efforts intended to support and empower library technology services, including Universal Service Administrative Company School and Library Program (USAC SLP – erate), TEACH Wisconsin, BadgerNet, Wisconsin Department of Public Instruction, Wisconsin Public Library Consortium (WPLC), and others.
4. Lead vendor relationship management and strategic procurement efforts for LEAN WI partners, member libraries and other interested library systems.
5. Assist member libraries within the LEAN WI footprint with technology consultation, long range strategic planning, and operation planning. **In 2024, revise network equipment asset inventory and mapping information for each library.**
6. Coordinate in-person and remote meetings with public library directors and technology managers of LEAN WI member libraries to establish and maintain working relationships, engage in technology assessment projects with their respective libraries, and facilitate collaborative efforts between libraries.
7. Strengthen Libraries Win integrated services:
 - Lifecycle Procurement utilization and Capital Procurement Assistance support.
 - Printer device and print management services coordination and support.
 - **Mobile Hotspot hardware and data plan management services coordination and support.**
 - **Website platform, development, and maintenance support.**
 - **Statistical data aggregation, warehousing, analytics, presentation, and preservation support.**
 - **Operational data storage, backup, and preservation support.**
 - **Improve member library awareness of, and documentation and process support for, existing and new system technology service offerings: currently Princh, Pharos, hot spots, videoconferencing. Identify new services that address library technology needs for internal functioning and public services.**

ONGOING ACTIVITIES RELATED TO ILS ADMINISTRATION

1. Host V-Cat council meetings and V-Cat committee meetings.
 2. Develop and monitor V-Cat budget.
 3. Review V-Cat By-laws, participation agreements, and contracts.
 4. Maintain awareness of the organizational structure and funding mechanisms of other ILS consortia in the state for best practices and optimized governance.
 5. Convene the V-Cat Steering Committee to assist staff in developing the annual V-Cat budget and reviewing V-Cat bylaws.
 6. Work to encourage cooperative and participatory V-Cat membership that adheres to the set V-Cat guidelines and procedures.
 7. Remain alert to the impact of V-Cat as it relates to members' collection related policies and practices.
 8. Monitor unmediated interloan between V-Cat participants.
 9. Seek opportunities to expand V-Cat Membership.
 10. Assess and evaluate member libraries' satisfaction with the effectiveness of V-Cat to support continuous improvement of V-Cat. **(Practice and Collaboration)**
 11. Provide qualified, trained staff devoted to the management and support of the shared Integrated Library System (ILS).
 12. Manage the shared ILS database.
 13. Offer library profile customization services for V-Cat members.
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ASSURANCES (cont'd)

14. Offer training opportunities and resources using a variety of delivery methods.
15. Work with V-Cat committees to normalize V-Cat policies, procedures, and practices among member libraries.
16. Provide an effective and efficient way for member libraries' holdings to be added to the database.
17. Work with member libraries to establish preferred practices and procedures for entering bibliographic and item holding records in the V-Cat database in accordance with currently accepted library cataloging and classification practices.
18. Ensure that bibliographic records, item records, and item status for materials in the V-Cat database are searchable through standard protocols.
19. Ensure access to reports to assist member libraries in managing ILS data.
20. Provide V-Cat consortium members with statistical data generated by the ILS as required for the DLT Public Library Annual Report, using standard definitions supplied by DLT.
21. Assess and evaluate member libraries' satisfaction with ILS support, the online catalog, discovery products, and training needs. **(Vendor Products and WVLS Support)**
22. Explore enhancements to the ILS, including peripheral ILS-related products and technologies, to improve V-Cat experience for consortium members and library patrons.
23. Encourage libraries to consider new ILS enhancements, including peripheral ILS-related products and technologies, investigate group pricing options, and assist with implementation and training as needed.
24. Work with the V-Cat Council and its committees to implement enhancements to the ILS, including peripheral ILS-related products and technologies.
25. Explore collaborative options with other library systems in Wisconsin to improve ILS services and support.
26. Assess and evaluate V-Cat from the user's perspective to support continuous improvement of V-Cat. **(User Experience)**
27. Participate in Innovative Users Group (IUG) and other professional organizations.

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

NEW / PRIORITY ACTIVITIES RELATED TO REFERENCE, REFERRAL AND INTERLIBRARY LOAN (2024)

1. Provide reference and interlibrary loan referrals for member libraries.
2. Encourage all member libraries to participate fully in interlibrary loan as lenders and borrowers.
3. Encourage all participating ILL libraries to follow interlibrary loan procedures and protocols established by the system and WI Department of Public Instruction's Library Services Team.
4. Guide libraries as needed through WISCAT system upgrades and changes in statewide resource sharing processes.
5. Communicate statewide resource sharing changes and updates, provide training and support when needed, and act as a conduit for troubleshooting on behalf of all libraries (public/multitype) in the system area.
6. **Monitor Public Library System Redesign (PLSR) recommendation to implement a discovery layer and participate in decision-making processes.**

NEW / PRIORITY ACTIVITIES RELATED TO TECHNOLOGY / NETWORK (2024)

1. Priority (annual) - Assess LEAN WI and Libraries Win service stacks, evaluating and reporting on service take rates, prioritization for continuity, depth of staffing, etc., and work with administration of LEAN WI partners to inform long range technology strategy, operational technology planning, and annual system planning.
 2. Priority (annual) - Explore and develop new service opportunities to benefit member libraries. Continue aggregation, realignment, and consolidation (ARC) project evolution.
 - Enhance processes for coordinating service-level and system-level planning requiring technology resources and support.
 - Coordinate with administration and service area teams across LEAN WI partners to broaden awareness of technology resources currently utilized and identify common long-term goals and technology resource needs.
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ASSURANCES (cont'd)

- Expand long term efforts to consolidate common technology resources with broader scope across service areas.
 - Develop and promulgate unified guidance with consistency across LEAN WI partners.
 - **Develop documentation for procedures and best practices shared across LEAN WI partners for both internal and library-site-specific processes.**
- 3. Provide proactive support with libraries' technology asset management until process become routine.**
 - 4. Provide timely acquisition, deployment and support of equipment procured through WVLS.**
 - 5. Create distinct IP ranges for each library location to improve Aspen functionality and accuracy of database usage statistics.**

NEW / PRIORITY ACTIVITIES RELATED TO TECHNOLOGY / NETWORK (2025)

1. Priority (annual) - Assess LEAN WI and Libraries Win service stacks, evaluating and reporting on service stack rates, prioritization for continuity, depth of staffing, etc., and work with administration of LEAN WI partners to inform long range technology strategy, operational technology planning, and annual system planning.
2. Priority (annual) - Explore and develop new service opportunities to benefit member libraries. Continue aggregation, realignment, and consolidation (ARC) project evolution.
 - Enhance processes for coordinating service-level and system-level planning requiring technology resources and support.
 - Coordinate with administration and service area teams across LEAN WI partners to broaden awareness of technology resources currently utilized and identify common long-term goals and technology resource needs.
 - Expand long term efforts to consolidate common technology resources with broader scope across service areas.
 - Develop and promulgate unified guidance with consistency across LEAN WI partners.

NEW / PRIORITY ACTIVITIES RELATED TO ILS ADMINISTRATION (2024)

1. Continue to **develop** sufficient local funding of V-Cat to ensure the stability of its operation and to alleviate the risk in the event of changes to regional library systems in Wisconsin. (Relates to ILS Administration no. 2 above.)
 2. Continue database clean-up project to strive toward standardization of records and record fields. (Relates to ILS Administration nos. 13, 14, 15, 17, 18, and 20 above.)
 3. Refine current processes used to generate reports from ILS data, including those required for the DLT Public Library Annual Report. Continue to further automate report generation and data visualizations. (Relates to ILS Administration nos. 8, 19, 20, 22, 24 and 25 above.)
 4. Develop and promote training using a variety of delivery methods, published in an academic year schedule to allow our librarians plenty of time to plan to attend. (Relates to ILS Administration nos. 6, 14, 16, 17, 19, 21, 23 above.)
 5. If applicable, continue ILS migration process. Re-negotiate current ILS contract or negotiate a new service contract with another ILS/Next Gen ILS and/or **continue** migration process. (Relates to ILS Administration points 12, 21-26 above.)
 6. Investigate cataloging practices of other consortia and compare with WVLS practices. Develop a plan to implement best practices, **including automated tools to assist with record creation and review**, as appropriate. (Relates to ILS Administration nos. 6, 12, 14-18.)
 7. If applicable, **continue to** take steps to merge the **WVLS/V-Cat and Northern Waters Library System/NWLN library system** databases and respective **ILS** consortia.
 8. **Pursue mechanisms to reduce member library staff time spent on routine tasks. Examples include:**
 - **Schedule and coordinate centralized batch record update changes.**
 - **Schedule and automate circulation notice delivery.**
 9. **Simplify procedures for resource sharing among member libraries. (Relates to ILS Administration no. 15.)**
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ASSURANCES (cont'd)

NEW / PRIORITY ACTIVITIES RELATED TO ILS ADMINISTRATION (2025)

1. Continue to **develop** sufficient local funding of V-Cat to ensure the stability of its operation and to alleviate the risk in the event of changes to regional library systems in Wisconsin. (Relates to ILS Administration point 2 above.)
2. Continue database clean-up project to strive toward standardization of records and record fields. (Relates to ILS Administration nos. 13, 14, 15, 17, 18, and 20 above.)
3. Refine current processes used to generate reports from ILS data, including those required for the DLT Public Library Annual Report. Continue to further automate report generation and data visualizations. (Relates to ILS Administration nos. 8, 19, 20, 22, 24 and 25 above.)
4. If applicable, continue ILS migration process. (Relates to ILS Administration points 12, 21-26.)
5. **Continue to investigate** cataloging practices of other consortia and compare with WVLS practices. Implement best practices, **including automated tools to assist with record creation and review**, as appropriate. (Relates to ILS Administration nos. 6, 12, 14-18.)
6. If applicable, **continue to** take steps to merge the **WVLS/V-Cat and Northern Waters Library System/NWLN library system** databases and respective **ILS** consortia.

Inservice Training

- X** 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.

ONGOING ACTIVITIES RELATED TO INSERVICE TRAINING

1. Maintain **live and recorded** continuing education events on the WVLS Continuing Education web page with current WVLS and state-wide offerings.
2. Partner with Northern Waters Library Service to provide continuing education and training opportunities to its member libraries.
3. Plan all continuing education opportunities in accordance with the requirements set forth in the *Certification Manual for Wisconsin Public Library Directors* published by the Wisconsin Department of Public Instruction (DPI).
4. Sponsor or co-sponsor a minimum of thirty-six (36) contact hours of continuing education opportunities annually for member library staff and trustees, as well as for library system staff and trustees.
5. Ensure that at least twelve (12) of the thirty-six (36) annual contact hours of continuing education are provided in-person at a location within a reasonable driving distance. For safety, pivot to virtual online continuing education opportunities as the need arises.
6. Sponsor a minimum of nine (9) contact hours annually of continuing education opportunities relating to youth and young adult services.
7. Offer a minimum of six (6) contact hours of technology-related continuing education opportunities sponsored or co-sponsored by LEAN WI.
8. Coordinate Spring **2024** statewide webinar series.
9. **Upon request, coordinate, and host Staff Development Day for Marathon County Public Library.**
10. Based on a *2019 State Continuing Education Survey* recommendation, continue to provide three pre-recorded/archived webinars throughout the year.
11. Survey member libraries to help WVLS assess continuing education and training needs. Evaluate and refine training opportunities, tools and resources offered to member library staff.
12. Host bi-annual gathering of public library directors.
13. Schedule listening sessions for staffs from all types of libraries, and Youth Services Information Exchanges

ASSURANCES (cont'd)

- (YSIEs) for all children's and YA staff, virtually or in-person.
14. Provide online "Staying Together" discussions on topics relevant to public libraries as needed. (Moved to from ELECTRONIC DELIVERY OF INFORMATION section.) **In 2024, plan for discussions on technology best practices, security and privacy awareness, and data.**
 15. Continue peer-to-peer mentoring program for new public library staff.
 16. Assign and distribute the 2023-2024 **and 2024-2025** state/LSTA professional development grants.
 17. Maintain, **promote and evaluate WVLS scholarship opportunities, including but not limited to scholarships through the WVLS Wessler Scholarship, and for the Association of Rural and Small Libraries (ARSL) Conference, Wisconsin Library Association (WLA) Conference, Wisconsin Association of Public Libraries (WAPL) Conference, American Library Association (ALA) Conference and Public Library Association (PLA) Conference.** (WEMTA Conference scholarship is reported under OTHER TYPES OF LIBRARIES on page 12.)
 18. Offer a travel grant to **area library staff and trustees to** attend the Wisconsin Library Association's Library Legislative Day.
 19. Provide a robust and responsive menu of training opportunities, tools, and resources for member library staffs through production of *Digital Bytes*. Continue to caption all productions.

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

NEW / PRIORITY ACTIVITIES RELATED TO INSERVICE TRAINING (2024)

1. Coordinate the **12th** annual Wild Wisconsin Winter Web Conference on **January 24-25, 2024** for public libraries in Wisconsin.
2. **Upon request, coordinate, and host a combined Staff Development Day on behalf of the T.B. Scott Library (Merrill) and the Tomahawk Public Library.**
3. **Schedule and host two in-person listening sessions for staff from all types of libraries.**

NEW / PRIORITY ACTIVITIES RELATED TO INSERVICE TRAINING (2025)

1. Coordinate the **13th** annual Wild Wisconsin Winter Web Conference in January **2025** for public libraries in Wisconsin.

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

Jamie Matczak, WVLS Education Consultant; jmatczak@wvls.org

Kristie Hauer, WVLS Public Library Services Consultant; khauer@wvls.org

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

WVLS has an informal arrangement with the Northern Waters Library Service in which WVLS plans and provides webinars on behalf of that system's member libraries. In turn, NWLS consults with WVLS member libraries on inclusive services matters.

ASSURANCES (cont'd)

Delivery and Communication

X 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.*

ONGOING ACTIVITIES RELATED TO ELECTRONIC DELIVERY OF INFORMATION

1. Produce/distribute annual statistical report and listing of system membership benefits.
2. Use a communications and marketing **calendar** to guide and coordinate communications methods to/from member library staff and trustees.
3. Publish monthly newsletter and encourage member libraries to contribute content.
4. Publish contributions to the WVLS blog *Digital Lites* **twice a month**.
5. Create and share ready-made promotional templates that promote library services and programs.
6. Enhance the WVLS website, and management/hosting strategy for internal and LEAN WI member library use. **Continue working with LEAN WI partners to access current hosting practices and strategies for all websites.**
7. Continue to **assess WVLS website for content, design/content presentation, and accessibility.**
8. **Maintain updated** web-based *Directory of Libraries and Librarians* **on WVLS website.**
9. Enhance professional development section on the WVLS website to include changes to mentorship and new director orientation processes.
10. Maintain list of web-based continuing education programs to help area public library directors maintain their state-required certification.
11. Create web bibliographies and tools on a variety of topics useful to WVLS member library staff and trustees on the WVLS web site.
12. Update resource packets for public library directors and WVLS trustees located on the WVLS website.
13. Share timely reminders and system, statewide and national library news via "Monday Mentions" email to the WVLS all-subscribers list.

ONGOING ACTIVITIES RELATED TO PHYSICAL DELIVERY OF LIBRARY MATERIALS

1. Subsidize three courier stops per week to each member public library and V-Cat service site and "vendor-sort" process. **Intra-system delivery is done by Waitco, Inc. WVLS staff who address delivery issues include Jamie Matczak, Brenda Walenton, Sue Hafemeister and Marla Sepnafski. Information about WVLS courier services is available on the WVLS website at <https://wvls.org/courier/>.**
2. Ensure local delivery service is available to member libraries at least five days per week.
3. Request monthly volume statistics from courier provider and share yearly data with the WVLS Board of Trustees and member libraries.
4. Review and update delivery schedules, policies and procedures as needed, and post them on the WVLS website.

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| | ASSURANCES (cont'd) | |
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5. Communicate courier schedule changes and instructions for packaging courier items with member libraries and courier vendor when needed.

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

NEW / PRIORITY ACTIVITIES RELATED TO ELECTRONIC DELIVERY OF INFORMATION (2024)

1. Continue to improve the WVLS Statistics booklet to make it more accessible and useful for member libraries and stakeholders by using examples from the DPI [March 2023 Data Landscape Report](#), information gathered from DPI Data Workgroup meetings, collaboration with other library partner services such as WiLS, and general professional development resources.
2. Continue to update Sierra Training website page to improve navigation, searchability and training materials.
3. Explore the creation of a shared opt-in communication/messaging platform for library directors to communicate directly with each other, with and without WVLS staff interaction.

NEW / PRIORITY ACTIVITIES RELATED TO ELECTRONIC DELIVERY OF INFORMATION (2025)

1. Continue to update Sierra Training website page to improve navigation, searchability and training materials.

NEW / PRIORITY ACTIVITIES RELATED TO PHYSICAL DELIVERY OF LIBRARY MATERIALS (2024)

1. Explore processes that improve efficiency and/or reduce costs of WVLS delivery services.

Service Agreements

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

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

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

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

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, 2024, 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://wvls.org/about-wvls/>

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:

See pages 5 and 6.

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:

Brenda Walenton, WVLS Business Manager: Employment Laws, HR Policies, Courier

Erica Brewster, WVLS Data and Technology Services Consultant: Data and Statistics, Advocacy, Website Design and Implementation, Technology Planning, Digitization

Jamie Matczak, WVLS Education Consultant: Social Media, Marketing, Certification, Customer Service, Public Speaking, Oral/Written Presentations, Staff Inservice, Advocacy, Project Management, Courier

Joshua Klingbeil, WVLS Deputy Director: Networks, Cybersecurity, Technology and Strategic Planning, Building/Remodeling, E-Rate, Contracts, Grant Development

Katie Zimmermann, WVLS ILS Administrator: ILS Software Functionality, Collection Development, Data and Statistics, Library Policies, Patron Privacy

Kris Adams Wendt, WVLS Public Library Consultant: Advocacy, Chapter 43, County Funding

Kristie Hauer, WVLS Public Library Services Consultant: Youth, YA and Adult Services, Grant Development, Intellectual Freedom, Collection Development, Space Needs/Layout and Design, Programming, Fundraising and Community Surveys, Advocacy, Strategic Planning, Personnel Matters, Digitization

ASSURANCES (cont'd)

Marla Sepnafski, WVLS Director: Chapter 43, County and Municipal Funding of Libraries, Library Administration (Policy Development, Strategic Planning, Standards, Budgets, Hiring a Director, Trustee Recruitment, Grant Development, Director/Trustee Orientation, Personnel Matters, Public Records and Open Meetings Laws)
Rachel Metzler, WVLS ILS and Database Support Specialist: Electronic Resources (WVLS Databases, BadgerLink Resources, E-Content Access), Cataloging, ILS Processes
Sherry Machones, NWLS Director: Inclusive Services for WVLS and NWLS member libraries
Sue Hafemeister, WVLS Administrative Assistant: Public Library Annual Report Information, Library Budgets, County Funding of Municipal Libraries

ONGOING ACTIVITIES RELATED TO PROFESSIONAL CONSULTATION SERVICES

1. Attend relevant meetings, webinars, and conferences, and share what is learned.
2. Provide consultant services to WVLS libraries of all types in the areas of: public library administration and governance, intellectual freedom and challenges, adult services, building/remodeling, staff development, planning/evaluation/standards, collection development, marketing and graphic design, strategic planning, and legal issues. (See also sections on Youth Services, Inclusive Services and Technology.)
3. Enhance consultation services in the areas of **data**, strategic planning and library building, remodeling, layout and design projects.
4. Provide grant-writing guidance and support.
5. Monitor public library directors' progress toward certification and recertification. Provide updates to each director as needed.
6. Assist member libraries in the process of filing annual reports.
7. Meet with new and current directors in the system to orient them to system services and to provide an overview of library services in Wisconsin.
8. Encourage orientation and ongoing training for area library board members.
9. Ensure appropriate library system staff meet with newly hired key library staff to provide an orientation on system services related to their positions.
10. Facilitate participation of member library staff, trustees, and supporters in local, regional, and statewide advancement events, e.g., candidate forums, WLA Library Legislative Day.
11. Maintain WVLS/public library system information packets to new member public and county library board members and to new legislators in the WVLS service area.
12. Assist libraries in promoting their value to their communities.
13. Assist member libraries in working for and securing local and county funding.
14. Facilitate individual county library service planning processes when requested.
15. Support member library staff and trustee advocacy efforts at all levels – local, county and state.
16. Encourage members of the WVLS library community to develop a network of citizen library supporters who can be strategically deployed as needed.
17. Advocate on the state level for system and public library initiatives, as well as other items included in the Wisconsin Library Association's legislative agenda of significance to the entire library community.
18. **Assist member libraries in providing timely reference assistance to those seeking voter registration and election participation information.**
19. Inform member library staff, trustees, and supporters of pending legislation on the state and national levels that may affect libraries and explain how the proposed legislation might affect system and local library service.
20. Network with a variety of state, regional and local government agencies on behalf of member libraries.
21. Represent the interests of member libraries to the Legislature and the Wisconsin Department of Public Instruction in the development of statewide library policy or services.
22. Cooperate with other agencies or organizations for the benefit of member libraries and area residents. Examples in 2022 include, regional Aging and Disability Resource Centers, CESAs, WI Early Childhood Collaborating Partners (WECCP)/regions, Wisconsin Humanities and Workforce Development Boards (WBD)/regions.
23. Support member libraries' use of the Beanstack web platform and smart device application.
24. Continue to maintain lists of WVLS area adult services speakers, performers, and programs to encourage the exchange of ideas, resource sharing, and collaborative booking.

MARKETING

ASSURANCES (cont'd)

25. Attend/Host meetings of the Public Library System marketing cohort to discuss opportunities for collaboration and cooperation.
26. Upon request, consult with colleagues on presentation and public speaking skills.
27. Develop tools that can be tailored by local libraries as needed, making it easier to create awareness of their accomplishments, needs, or concerns, e.g., press releases, sample letters to officials, videos, infographics, social media templates, advocacy toolkits.
28. **Purchase marketing resources for library-related events such as Library Card Sign-Up Month. Distribute resources to member libraries.**
29. Assist member libraries to identify, implement, document, and publicize programs and services that (1) expand technology services for patrons with limited broadband access, (2) enhance workforce development assistance, and (3) provide a gateway to learning in all stages of life.
30. Provide website layout and design consultation services to LEAN WI member libraries upon request. Continue to evaluate and refine curriculum and processes while onboarding interested NWLS member libraries. **Evaluate curriculum and processes to enhance training experiences for novice and advanced website staff.**

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

NEW / PRIORITY ACTIVITIES RELATED TO PROFESSIONAL CONSULTATION SERVICES (2024)

1. Continue evaluation of WVLS orientation for new public library directors (described under no. 7 above).
2. **As part of the WVLS orientation for new trustees and public library directors and staff, create a video that describes the services and support offered through LEAN WI.**
3. **Pilot WVLS Marketing Grant program for member libraries to develop/enhance a marketing plan or campaign.**
4. **Attend the national Library Marketing and Communications Conference and share highlights with WVLS staff, member libraries and Public Library System Marketing Co-Hort.**
5. Secure funding for a **2024-2025** WVLS Innovation Grant for a member library to beta test the acquisition and installation of an outdoor Pickup Locker System.
6. **Provide area public library directors, as well as municipal and county clerks with data to complete annual processes for county reimbursements to home county libraries and libraries in adjacent counties.**
7. **Offer to complete county funding invoices and submit to county clerks on behalf of public library directors.**
8. **Provide libraries with LEAN WI website support to enhance website usability and accessibility.**
9. **Use information from DPI's [March 2023 Data Landscape Report](#) to assess data driven decision making competencies among WVLS member library staff and stakeholders. Formulate training objectives and develop training curricula as appropriate.**

NEW / PRIORITY ACTIVITIES RELATED TO PROFESSIONAL CONSULTATION SERVICES (2025)

1. Continue to implement and refine orientation process for new member library directors in conjunction with WVLS mentoring program, and with new trustees on library and county library boards.
2. Continue administration of the **2024-2025** WVLS Innovation Grant. (Described in no. 5 above.)

Inclusive Services

- X** 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.

ONGOING ACTIVITIES RELATED TO INCLUSIVE SERVICES CONSULTATION

1. Through a partnership with Northern Waters Library Service, provide member libraries with access to expertise and consulting to assist them in planning, developing, and evaluating inclusive services, guided by *What Does it Mean to Be Inclusive? A Statement from the Division of Libraries and Technology* and the Wisconsin Department of Public Instruction's *Inclusive Services Assessment and Guide* and the American Library Association's *Accessible*
-

ASSURANCES (cont'd)

Communication Styles and *Virtual Accessibility* toolkits.

2. Maintain collection of professional materials on inclusive services.
3. Share Inclusive Services information and resources via WVLS communications channels (blog, email, newsletter).
4. Maintain current and relevant Inclusive Services resources and tools on the WVLS website.
5. Participate in regional Inclusive Services collaborations with member libraries, appropriate agencies, and other systems. Support member library outreach efforts to extend services to underserved populations.
6. Provide Inclusive Services continuing education opportunities for member libraries.
7. Create 1-3 *Digital Bytes* training videos related to Inclusive Services.
8. Attend the annual Toward One Wisconsin Conference and share highlights with member libraries and WVLS Board of Trustees.

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

NEW / PRIORITY ACTIVITIES RELATED TO INCLUSIVE SERVICES CONSULTATION (2024)

1. Incorporate EDI (Equity, Diversity and Inclusion) topics in member library discussions held throughout the year.
2. Target consulting and support on topics outlined in the Wisconsin Department of Public Instruction's *Inclusive Services Assessment and Guide*. In 2023, target member libraries' awareness of resources and checklists in "Chapter 4: What the Library Has to Offer" relating to library collections, programming, and services.

NEW / PRIORITY ACTIVITIES RELATED TO INCLUSIVE SERVICES CONSULTATION (2025)

1. Target consulting and support on topics outlined in the Wisconsin Department of Public Instruction's *Inclusive Services Assessment and Guide*. In 2024, continue to target member libraries' awareness of resources and checklists in "Chapter 4: What the Library Has to Offer" relating to collections, programming, and services.

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.)

ONGOING ACTIVITIES RELATED TO COLLECTION DEVELOPMENT SERVICES

1. Provide access to electronic resources to meet the needs and demands of area library users and to back up the collections of member libraries.
 2. Provide the resource library a collection development grant to expand the breadth and scope of its fiction and nonfiction collections.
 3. Provide area library directors with usage reports for WVLS electronic databases and OverDrive collections.
 4. Continue membership in the Wisconsin Public Library Consortium to provide access to the Wisconsin Digital Library, and associated initiatives.
 5. Subscribe to professional journals and route to interested member libraries.
 6. Monitor usefulness of content available through WPLC membership and share member library feedback with the WPLC Board.
 7. Maintain a professional materials collection and make titles available for loan to any library in the state.
 8. Maintain the shared WVLS/IFLS/NWLS collection of makerspace resources.
 9. **Promote** the WVLS collections of databases, makerspace items and professional resources to members throughout the year. **Use WVLS communications and marketing calendar to guide this effort.**
 10. Share reader's advisory information with area libraries.
 11. Share collection development information and resources with area libraries.
 12. Continue the shared WVLS/IFLS/NWLS Digitization Program (Project IONh) that offers interested member libraries consultation, best practices, and support, and which provides member libraries opportunities to share their digitized collections with Recollection Wisconsin and the Digital Public Library of America.
 13. Help member libraries with weeding and/or inventory projects.
 14. Explore and pursue alternative funding to support the WVLS OverDrive Advantage account.
 15. Investigate new digital resources that may be beneficial to member libraries.
-

ASSURANCES (cont'd)

16. To inform collection development practices, provide libraries with **age and** usage reports for physical materials collections in the V-Cat database.
17. Investigate, implement and support opportunities to reduce wait times on high demand items of interest to users of WVLS member libraries.

NEW / PRIORITY ACTIVITIES RELATED TO COLLECTION DEVELOPMENT SERVICES (2024)

1. **Investigate an alternative digital educational resource to replace Gale Courses.**
2. Evaluate contracts and usage for WVLS subscription-based electronic resources provided for member libraries and their patrons.
3. Encourage collaborative collection development by member libraries in selected subject areas.

NEW / PRIORITY ACTIVITIES RELATED TO COLLECTION DEVELOPMENT SERVICES (2025)

1. Evaluate contracts and usage for WVLS subscription-based electronic resources provided for member libraries and their patrons.
2. Encourage collaborative collection development by member libraries in selected subject areas.

ONGOING ACTIVITIES RELATED TO YOUTH SERVICES

1. Provide member libraries with access to expertise and consulting to assist them in planning, developing, and evaluating youth and young adult services.
2. Partially subsidize a performer at member libraries' summer reading programs.
3. Meet virtually or in-person with youth services staff from member libraries to determine grants, focus of CE workshops, and directions for future projects. (See also Continuing Education, no. 11., page 3)
4. Assist member libraries in marketing youth and young adult activities.
5. Maintain a system-wide movie licensing agreement to enable public performance movie programming for interested libraries. Conduct annual review to assess cost effectiveness and invite additional participation.
6. Host annual "dine-around gathering" **following the annual Children's Book Fest hosted by the Rhinelander District Library.** This unique opportunity brings together public library youth services staff and school media specialists to discuss priorities for the WVLS youth services program.
7. Partner with the DPI/DLT Public Library Youth and Special Services Consultant and other system youth services consultants to implement and promote early literacy and other statewide initiatives.
8. Facilitate collaborations on youth and young adult services.
9. Assist member libraries in the development of coding and STEM/STEAM/STREAM programs for children and teens.
10. Maintain the WVLS Youth Services Information Exchange (YSIE) Facebook page to encourage the exchange of ideas and resource sharing.
11. Feature member library youth services spaces during virtual or in-person YSIE gatherings.
12. Include Youth Services Librarians in WVLS Scholarship opportunities.

NEW / PRIORITY ACTIVITIES RELATED TO YOUTH SERVICES (2024)

1. Attend the National ALSC (Association for Library Services to Children) Institute and share what is learned with youth services colleagues. **If funding is available, offer a scholarship for a youth services colleague to attend this event as well.**
 2. **Support and partially subsidize member libraries' activities in the Summer Math Adventure program, a coordinated effort between the WI Department of Public Instruction and the Wisconsin Mathematics Council.**
-
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ASSURANCES (cont'd)

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 **2023** system audit to the Division no later than September 30, 2024.
-

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.

2024 Collaborative Activities

Facet – LEANWI Technology Services Partnership:

Summary Element:

Indianhead Federated Library System (IFLS), Northern Waters Library Service (NWLS), and Wisconsin Valley Library Service (WVLS) collaborate directly in the Libraries and Enterprise Applications Nexus of Wisconsin (LEANWI) partnership. This partnership represents 107 public libraries with 117 locations across 25 counties. Much of the collaboration between the partnering systems and our public library members continues to occur in the traditional sense, between Library Systems and Public Library members. Intra-partnership collaboration, exchange of services, deduplication of efforts, and ongoing efforts to strengthen the production status of our shared infrastructure are expected to continue during 2024.

COVID-19 mitigation measures in 2020 and 2021 initially saw planned and in-processes projects put on hold or delayed. Federal funding support coupled with a strong funding management response by the WI Dept. of Public Instruction had the effect of rearranging project priorities, injecting entirely new projects, and enabling several projects to be reengaged. The Backup and Collaboration project was affected though Site Partners (LEANWI and SCLS) were able to implement backup operations and additional utilization efforts ramped up during 2022 and 2023. In the latter part of 2023, WPLC Backup and Digital Archive subcommittees recommended and are anticipating being restructured as working groups under the WPLC Technology Steering Committee. As such, those committees' respective efforts and results to date - to meaningfully express investment costs and ongoing operational overhead - are expected to be transferred to the governance and administration of the Technology Steering Committee. For now, the raw cost benefit to the LEANWI partnership for the specific backup and archive needs met will be estimated in the same manner as for 2020 and 2021. A base of \$1,000,000 (approximate initial capitalization cost for both sites) divided by the initial five-year lifecycle is used as in previous years.

The human resources overhead for LEANWI services is anticipated to be at full capacity for technology consulting and support FTE during 2024. In part as a response to the departure of our shared website service consultant (approximately .5 FTE), a new role was developed and directly shared by the partnership is anticipated to be filled in January, adding a 7th FTE for collaboration purposes. This overhead for this role will be shared (by relative percent-of-state aid formula) by LEANWI partners and thus it will be accounted for in LEANWI Operational Overhead rather than Human Resources (which accounts for human resources that maintain the partnership and services but are budgeted locally by each individual partner with no cost sharing). This new role will share website services with at least one of the six technology FTE and will also lead digitization consulting services. HR Overhead is anticipated to be slightly lower in 2024 due to the blending of approximately 0.5 FTE website services into the existing technology team. Operational overhead for 2024 is anticipated to be higher than all previous years due to the addition of 1 FTE for additional website services and new digitization services. The combined human resources and operational overhead for LEANWI services is estimated to be approximately \$1,012,000.

The combined utilization-adjusted replacement value of this service platform for public library collaborators is estimated to be \$48.8 million. The offset cost benefit value of the LEANWI partnership is estimated at approximately \$47.8 million. The LEANWI partnership is estimated to represent an average cost benefit of approximately \$15.9 million per partner system in 2024.

Cost Benefit Element(s)

Activity: Technology Services (LEANWI Partners and Library Members)

Amount: \$37,529,850

Average: \$12,509,950 (per partner)

Activity: Website Services (LEANWI Partners and Library Members)

Amount: \$2,407,500

Average: \$802,500 (per partner)

Activity: Makerspace Kits Shared Lending Pool (LEANWI Partners and Library Members)

Amount: \$2,190,000

Average: \$730,000 (per partner)

Activity: Backup and Archive (LEANWI Partners and Library Members)

Amount: \$6,643,000.**Average:** \$2,214,300. (per partner)

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

| | Human Resources | Application Services | Totals |
|----------------------------------|-----------------|----------------------|---------------|
| LEANWI Est. Operational Overhead | \$ 630,000 | \$ 381,880 | \$ 1,011,880 |
| Tech Services - Libraries | \$ 31,297,500 | \$ 6,232,350 | \$ 37,529,850 |
| Website Program - Libraries | \$ 1,203,750 | \$ 1,203,750 | \$ 2,407,500 |
| Makerspace Program - Libraries | \$ 1,770,000 | \$ 420,000 | \$ 2,190,000 |
| Backup and Archive - Libraries | \$ 2,755,000 | \$ 3,888,000 | \$ 6,643,000 |
| Est. Replacement Value - Total | \$ 37,021,750 | \$ 11,744,100 | \$ 48,770,350 |
| LEANWI Offset Cost Benefit Value | \$ 36,391,750 | \$ 11,362,216 | \$ 47,758,470 |

Facet – Advanced Networking: Summary Element:

WVLS is a member of the Wausau Community Area Network (WCAN) and IFLS is a member of the Chippewa Valley Inter-Networking Consortium (CINC) allowing each system to dedicate a 1,000 Mbps circuit to the LEANWI shared data center. Equivalent circuits are estimated to have a base cost of approximately \$1500 per month each. Assuming E-Rate discounts, the estimated annual cost for leasing and maintaining such a circuit and supporting equipment independently would be approximately \$15,000. The average cost of membership and maintenance for the WCAN and CINC is approximately \$3,500 annually, resulting in a direct estimated cost benefit to each system for participation in regional collaborative networks of approximately \$11,500 in 2024.

The BadgerNet Network is a service contracted under the Wisconsin Dept. of Administration (DOA) with significant operations and funding program management efforts performed by the DOA's Technology for Educational Achievement (TEACH) program on behalf of schools and libraries. Additionally, the Wisconsin Dept. of Public Instruction's Division for Libraries and Technology put in significant effort, coordinating with DOA, TEACH, and Library Systems to ensure this massive statewide collaborative effort runs as smoothly and efficiently as possible. This is an annually recurring element of collaboration effecting a direct individual cost benefit to library systems and libraries and enables further collaborative value between library systems and member libraries. LEANWI partners will be operating at least one 5Gbps BadgerNet circuit. It is estimated that an equivalent replacement service (assuming E-Rate discounts and ideal circumstances for all aspects of service) would have caused a minimum net cost increase of approximately \$45,000 for the head-end circuits and approximately \$3,000 per BadgerNet member site on average. This results in an estimated direct net cost benefit of approximately \$375,000 for LEANWI partners and member libraries.

Each LEANWI partner is a member and partner of the private, non-profit research and educational network services provider, WiscNet. Each system contributes a \$1,500 membership fee annually to participate in a variety of valuable peer information sharing opportunities and to leverage various technology services. As a member, each partner is eligible for network services, which includes Internet transiting services with no upper limits to throughput. The cost of WiscNet network services is approximately \$10,000 per year per partner. Comparatively, 10 Gigabit transit services listed under State of Wisconsin contract 505004-014-BCNMGSRVCS-01 are not expressly priced, but scale to approximately \$8,000-\$10,000 per month or \$96,000 to \$120,000 per year. WiscNet network services include several benefits (such as assigning large blocks of public IP addresses and providing service at multiple connection points) not available from other vendors, or available at additional cost. These secondary benefits have an approximate value of \$20,000 per year across LEANWI partners. WiscNet does not charge any additional fees for library members behind the LEANWI converged Wide Area Network (WAN) resulting in a minimum collaborative cost benefit value of \$1500 per library. Partners also share access to a highly discounted data center facility leased through WiscNet with rack space and power costs estimated to be approximately \$16,500, or roughly \$5,500 per LEANWI partner. Equivalent self-managed or outsourced facilities vary widely in cost from approximately \$12,000 to \$40,000+ per LEANWI partner.

Cost Benefit Element(s)

Activity: Community Area Networks (LEANWI Partners {IFLS, WVLS}, CCITC, CVTC, NTC, several K12 districts and many other members)

Amount: \$23,000.

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

Activity: BadgerNet Network (DOA-DET/TEACH, DPI, LEANWI Partners, Library Members)

Amount: \$375,000.

Average: \$125,000. (per partner)

Activity: WiscNet Partnership (LEANWI Partners, Library Members, WiscNet)

Amount: \$340,000.

Average: \$113,300. (per partner)

3. Digital Content

The Wisconsin Public Library Consortium's most significant collaborative project is the pooling of system and public library funds to support the Wisconsin Digital Library.

In 2024, statewide contributions to the collection to support e-audio/book/magazine formats will be approximately \$1,574,338. Subtracting the WVLS member library share of \$75,426, from this amount, the value of the collaboration is \$1,498,912.

4. Databases / Professional Materials

Were each member library to purchase the databases, journals, and professional resources WVLS annually makes available to all member library staff and trustees, the **estimated** average cost to each library would be \$14,500 (which includes a replacement to the Gale Courses subscription WVLS plans to discontinue in late 2023), or \$362,500 total. Also, if each public library were to have their own database and journal subscriptions, approximately one hour/week (at \$50/hour) would be spent on development of training materials, educating staff and patrons, evaluating products, vendor negotiations and product development. $50 \times 52 \text{ (weeks)} \times 25 \text{ (libraries)} = \$65,000$.

5. V-CAT / ILS Administration

The WVLS ILS consortium, V-Cat, has 25 public libraries across 35 locations. Were each member to run/manage its own stand-alone online catalog, a minimum of 15 FTEs at \$40/hr would be necessary to maintain some level of equivalent local ILS services to member communities in areas of ILS database support, cataloging services and network support. Approximate value is \$1,248,000. Approximate vendor maintenance service minimums based on our current system maintenance levels for the ILS, Discovery Layer, E-Commerce - are estimated at \$500,000 in aggregate. Other operational overhead costs for peripheral services, staff training, insurance, etc are estimated minimally at \$110,000. Ignoring the cyclical product procurement/upgrade costs and the utility of replacement/contingency reserve funds, the total estimated minimum value of ILS management and maintenance services operations was approximately \$1,858,000. Considering the 2024 V-Cat maintenance share paid for by consortium members (\$244,600), this leaves the cost benefit of the ILS Administration at an estimated minimum of approximately \$1,613,400 annually.

6. Continuing Education and Training

WVLS plans to partner with all 14 public library systems in 2024. The January 2024 Wild Wisconsin Web Conference will provide 14 high-quality webinars to all public libraries in Wisconsin as well as interested library staff across the nation. This collaboration, minimally, saved each system \$7,000 in speaker fees. WVLS also plans to partner with all 14 public library systems for the August 2024 Wisconsin Trustee Training Week and September 2024 Tech Days. These events save systems approximately \$2,000 each in speaker fees. The approximate value is \$135,000 (\$105,000 + \$30,000).

Also, the staff time for these collaborations - to plan, market and host - is approximately 80 hours for the WWWWC and 20 hours for TTW. At \$40/hour, the benefit to all 15 systems is \$72,000 in staff time.

All WVLS workshops/webinars/trainings were offered free of charge. Assuming a registration fee of \$25/event, and that one staff member from each WVLS public library attended live webinars/workshops or viewed archived recordings, the cost/library savings is \$1,150/library; \$28,750 for all libraries. Total value = \$235,750.

7. Delivery Services

If each library were to assume the purchase of courier tubs, bags and routing envelopes in 2024, their cost would be approximately \$2,000/year averaged across the smallest library to the largest library. $\$2,000 \times 25 = \$50,000$ in savings.

WVLS oversight of courier services (statistics, vendor communications and negotiations, financial reporting) provides 1 hour in staff time (at \$40/hour) for each library, each week. The benefit is approximately \$52,000.

Also, since WVLS, IFLS Library System and NCFLS/OWLS have contracts with Waltco, our libraries benefit from direct and timely hub to hub delivery rather than sending all interlibrary loan items down to Madison through the state delivery service.

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

| Activity | Amount |
|--|------------|
| 1. LEAN WI Technology Services Partnership | 16,256,750 |
| 2. Advanced Networking | 249,800 |
| 3. Digital Content | 1,498,912 |
| 4. Databases / Professional Materials | 427,500 |
| 5. V-Cat / ILS Administration | 1,613,400 |
| 6. Continuing Education and Training | 235,750 |
| 7. Delivery Services | 102,000 |

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

| Activity | Amount |
|---------------------------|---------------------|
| 9. | |
| 10. | |
| Cost Benefit Total | \$20,384,112 |

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 **2024**.

| | | |
|---|--|---|
| Name of System Director <i>Marla Sepnafski</i> | Signature of System Director <i>Marla Sepnafski</i> | Date Signed Mo./Day/Yr. <i>9.16.2023</i> |
| Name of System Board President <i>Thomas Bobrofsky</i> | Signature of System Board President <i>Thomas Bobrofsky</i> | Date Signed Mo./Day/Yr. <i>9/16/23</i> |

**FOR DPI USE
LIBRARY SYSTEM PLAN APPROVAL**

| | | |
|---|---|-------------------------------------|
| Pursuant to Wis. Statutes, the plan contained herein is: <input type="checkbox"/> Approved <input type="checkbox"/> Provisionally Approved See Comments. <input type="checkbox"/> Not Approved See Comments. | DLT Assistant Superintendent Signature <i>Darrell L. Williams, Ph.D.</i> | Date Signed Mo./Day/Yr. 11/20/23 |
|---|---|-------------------------------------|

Comments

| PUBLIC LIBRARY SYSTEM 2024 ANNUAL PROGRAM BUDGET | | | | | |
|---|--------------------------------|--|---|--------------------|--------------------|
| Program | 2024 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. Reference and Interlibrary Loan | 13,214 | 108 | 0 | 2,644 | |
| 2. V-Cat Administration (ILS) | 169,876 | 1,382 | 50,000 | 624,854 | |
| 3. Electronic Delivery | 32,100 | 274 | 0 | 4,801 | |
| 4. Technology | 118,522 | 935 | 0 | 1,101,062 | |
| 5. Electronic Resources | 59,756 | 177 | 0 | 72,204 | |
| Program Total | \$393,468 | \$2,875 | 50,000 | \$1,805,566 | \$2,251,909 |
| Continuing Education and Consulting Service* | | | | | |
| 1. Continuing Education | 75,211 | 458 | 21,525 | 22,026 | |
| 2. Consulting | 261,744 | 2,150 | 0 | 40,898 | |
| Program Total | \$336,955 | \$2,608 | \$21,525 | \$62,924 | \$424,011 |
| Delivery Services | 245,052 | 171 | 0 | 15,349 | \$260,572 |
| Inclusive Services | 6,632 | 54 | 0 | 1,247 | \$7,933 |
| Library Collection Development | 33,756 | 177 | 0 | 4,104 | \$38,037 |
| Direct Payment to Members for Nonresident Access | 0 | 0 | 0 | 0 | \$0 |
| Direct Nonresident Access Payments Across System Borders | 0 | 0 | 0 | 0 | \$0 |
| Youth Services | 51,051 | 380 | 0 | 18,706 | \$70,137 |
| Public Information | 41,955 | 274 | 0 | 7,251 | \$49,480 |
| Administration | 140,302 | 960 | 0 | 26,952 | \$168,214 |
| Subtotal | \$518,748 | \$2,016 | \$0 | \$73,609 | \$594,374 |
| Other System Programs | | | | | |
| 1. | | | | | \$0 |
| 2. | | | | | \$0 |
| Program Total | \$0 | \$0 | \$0 | \$0 | \$0 |
| Grand Totals | \$1,249,171 | \$7,500 | \$71,525 | \$1,942,098 | \$3,270,294 |

*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).