

NOTICE

Milwaukee County  
Federated Library System  
Board of Trustees

Monday, March 15<sup>th</sup>, 2021

3:30 P.M.

This meeting will be conducted online  
using Zoom meeting software

Meeting URL: [CLICK HERE](#)

Download Zoom: <https://zoom.us/download>

Instructions: <https://support.zoom.us/hc/en-us/articles/201362193-Joining-a-Meeting>

AGENDA

1. Call to order
2. Adoption of agenda
3. Approval of minutes: the MCFLS Board of Trustees meeting on Monday, February 15<sup>th</sup>, 2021  

Action      [Attachment A](#)
4. Public comment
5. Library Directors Advisory Council--Report of the March 4<sup>th</sup>, 2021 Meeting  

Action      [Attachment B](#)

Please note: Upon reasonable notice, efforts will be made to accommodate the needs of disabled individuals through sign language interpreters or other auxiliary aides.

Board of Trustees—Administrative reports requiring action

- |  |        |                              |
|--|--------|------------------------------|
| 6. Financial Report—February 2021                                  | Action | <a href="#">Attachment C</a> |
| 7. 2020 Resource Library Report                                    | Action | <a href="#">Attachment D</a> |
| 8. MCFLS Marketing Plan  | Action | <a href="#">Attachment E</a> |
| 9. Re-evaluation of MCFLS Board meetings (in-person/online/hybrid) | Action |                              |
| 10. Follow up on additional \$50,000 in Milwaukee County funding.  | Action | <a href="#">Attachment F</a> |

Administrative Informational Items

- |   |                              |
|---|------------------------------|
| 11. Wisconsin Policy Forum Report regarding Milwaukee Public Library      | <a href="#">Attachment G</a> |
| 12. Update on Recruitment for Network Administrator/PC Support Specialist |                              |
| 13. Director's Report   | <a href="#">Attachment H</a> |

Executive Session—System Director Evaluation

- |   |  |
|---|--|
| 14. Motion to Move into Executive Session.  |  |
| 15. In Executive Session. Pursuant to Wisconsin Statutes 19.85(1)(c) "Considering employment, promotion, compensation or performance evaluation data of any public employee over which the governmental body has jurisdiction or exercises responsibility." |  |
| 16. Motion to Move Out of Executive Session.  |  |

Next meeting date: April 19<sup>th</sup>, 2021 at 3:30 pm via Zoom online meeting software.

Milwaukee County Federated Library System  
Board of Trustees

Regular Monthly Meeting held Monday, February 15, 2021  
Zoom Meeting

ROLL CALL

Present: Paul Ziehler, President  
Steven Shea, Vice President  
Nik Kovac, Treasurer  
Guy Johnson, Trustee  
Howard Snyder, Trustee  
Elizabeth Suelzer, Trustee

Staff: Steve Hesel, Director  
Judy Kaniasty, Business Manager

Others: Jill Lininger, LDAC Chair and Oak Creek Public Library  
Joan Johnson, Milwaukee Public Library

CALL TO ORDER. President Ziehler called the regularly scheduled monthly meeting of the Milwaukee County Federated Library System Board of Trustees to order at 3:30 p.m.

ADOPTION OF AGENDA. President Ziehler referred to the agenda. Trustee Snyder moved and Vice President Shea seconded a motion to approve the agenda as distributed. Unanimously approved.

APPROVAL OF MINUTES. President Ziehler referred to the minutes of the Monday, January 25, 2021 meeting which are shown as Attachment A of the agenda packet. Trustee Johnson moved and Trustee Suelzer seconded a motion to approve the minutes as presented. Unanimously approved.

PUBLIC COMMENT. None.

LIBRARY DIRECTORS ADVISORY COUNCIL. Jill Lininger reviewed her report of the February 4, 2021 LDAC meeting which is shown as Attachment B of the agenda packet and responded to Board questions. Trustee Johnson noted that he had listened to an interview of MPL Director Joan Johnson recently and Joan Johnson indicated that interview was held a while back but it just aired recently. Vice President Shea moved and Trustee Snyder seconded a motion to accept the LDAC report and place it on file. Unanimously approved.

[Trustee Kovac arrived at 3:38 p.m.]

BOARD OF TRUSTEES – ADMINISTRATIVE REPORTS REQUIRING ACTION

Financial Report – January 2012. President Ziehler referred to the January, 2021 financial report, which is shown as Attachment C of the agenda packet. Judy Kaniasty noted that the generous donation from

MPL arrived in January and it is reflected on lines 28 and 97 of the financial report accordingly. President Ziehler pointed to the thank you letter send from the MCFLS Board which is Attachment E of the agenda packet. Vice President Shea moved and Trustee Johnson seconded a motion to approve the January 2021 financial report as presented. Unanimously approved.

2020 MCFLS Annual Report to DPI. Director Hesper summarized the 2020 MCFLS Annual Report shown as Attachment D of the agenda packet which DPI approval is required to release the final 25% of State Aid by March 1, 2021. Director Hesper highlighted that while physical circulation of materials is down, use of electronic resources skyrocketed due to the pandemic access restrictions at libraries. Trustee Johnson commented that the importance of libraries in neighborhoods is very important and hopes everyone keeps that in mind. Director Hesper agreed and noted that the statewide marketing campaign will be aiming to get people back to their libraries for the sense of community. Trustee Snyder asked that libraries analyze what did and didn't work during the pandemic so the lessons learned can be available if any future hardships were to arise again. Director Hesper commented that working more closely with the State and other Systems on matters relative to all did bring more collaboration in thoughts and actions across the State. Joan Johnson added that MPL is thinking the same thing; President Ziehler asked that the LDAC discuss this idea by year-end and report to the MCFLS Board on it. Trustee Johnson moved and Vice President Shea seconded a motion to approve the 2020 Annual Report as presented and to forward it to the State as required before the deadline. Unanimously approved.

MCFLS Director Evaluation Process. President Ziehler noted that it in the past the MCFLS Director was evaluated every year and he wondered whether that was still something the Board would like to do? Judy Kaniasty sends out a survey and responses are reviewed. It was the consensus of the Board that the same procedure be done as in the past with the Board, LDAC and MCFLS staff sent a survey based on the 2020 goals and objectives and that the results be discussed at next month's meeting.

Additional \$50,000 in Milwaukee County Funding. Director Hesper reported that the LDAC has reviewed a number of different options for spending the additional \$50,000 from Milwaukee County to enhance electronic resources to the residents of Milwaukee County and recently voted unanimously to use the funding toward OverDrive Advantage. Director Hesper then asked whether the Board would like to use the funds to reduce hold wait times on high demand items or consider adding titles from a specialized subject such as what MPL did last year for diversity titles and he would suggest using half of the funds for both of those needs. The recently donated \$90,000 from MPL will be spent being split across different reading levels and Director Hesper noted that he believes additional funds will be donated to target titles of interest in the 60+ population. It is felt these additional funds will make the collection more attractive to our residents as well as statewide. Trustee Johnson asked what the LDAC might think about this plan and LDAC Chair Jill Lininger agreed with Director Hesper that those ideas for spending are well thought and reasonable.

#### ADMINISTRATIVE INFORMATIONAL ITEMS

MCFLS Board Letter of Thanks to MPL Board of Trustees for Additional OverDrive Funding. President Ziehler referred to Attachment E of the agenda packet which was mentioned earlier in the meeting.

West Milwaukee Patron Access to Electronic Resources. Director Hesper reported that while checking database settings it was determined that West Milwaukee patrons have been able to get access to OverDrive electronic resources by mistake and so the access was turn off. Patrons then were not pleased and now West Milwaukee is agreeable to discussing paying for that access. Attachment F of the

agenda packet shows how much it would cost for the year ended September 30 and since access was a MCFLS mistake, Director Hesel is proposing that MCFLS pay the \$452 which is based on a percentage of usage against the total usage/cost that is budgeted and then allow time for MCFLS and West Milwaukee to negotiate a contract addendum for 2022 and beyond and to allow the service to be turned on again to those residents. Discussion ensued and Director Hesel will bring back a permanent amendment to the West Milwaukee agreement for Board consideration after conferring with LDAC for input.

Update on Recruitment for Network Administrator/PC Support Specialist. Director Hesel reported that 43 applications were received for the job posting and with the help of Robert Trunley from Wauwatosa, he and Judy Kaniasty have narrowed the candidates down to a manageable number and are in the process of arranging interviews for the week of February 22 with the hopes of offering the job to a most deserving applicant in early March.

Director's Report. Director Hesel reported that normally the Resource Library Agreement report is presented in February reviewing the past year, however MPL Director Joan Johnson requested that she be able to present that report next month and she will include information regarding the Public Policy Forum's interview and funding for MPL as a public library system.

Director Hesel reviewed his report, which is shown as Attachment G of the agenda packet and responded to questions from the Board relating to VOIP possibility and costs for member library internet; budgeting of libraries and library systems and WLA lobbyist effectiveness. Director Hesel agreed to share Library Legislative Day handouts and agenda/speaking points as requested.

NEXT MEETING. Scheduled for Monday, March 15, 2021 beginning a 3:30 p.m. via Zoom online meeting software.

ADJOURNMENT. With no further business to be addressed, Vice President Shea moved and Treasurer Kovac seconded a motion to adjourn the meeting at 4:45 p.m. Unanimously approved.



**OAKCREEK**  
— WISCONSIN —

PUBLIC LIBRARY

March 4, 2021

To: MCFLS Board of Trustees  
From: Jill Lininger, Oak Creek Public Library  
Summary of LDAC Meeting for March 4, 2021  
Location: Zoom Teleconference

### Discussion

- Sharing COVID-19 Response / Updates
  - Some of the libraries are beginning to expand their services including getting rid of time limits and reopening study rooms. Hales Corners, Greendale and Franklin are seeing an uptick in student/tutor traffic since many of the other libraries are open for browsing only.
  - When Brown Deer opens their new facility later this month, they will be opening at pre-COVID hours.
- DPI Updates
  - DPI has received a Google Marketing Grant will use this money to do marketing statewide for libraries. They will also integrate some LAWDS grant funding and market the job resources LAWDS has available at the same time.
  - PLSR is moving forward with preliminary discussions about statewide delivery. Judy and Steve have been talking with Bruce Smith from DPI about a Southeast WI delivery route that would include MCFLS, Bridges, Arrowhead, Lakeshores, and Kenosha Library Systems, as well as academic libraries located within those systems. By eliminating South Central as the central sorting hub for all intersystem deliveries, we can reduce turn around time for our patrons to receive materials. Most likely, MPL Central would become the main sorting hub for this delivery route.
- Steve presented statistics and several options for how to spend the additional county contribution to Overdrive Advantage. The directors unanimously agreed to spend 50% of the funding on high demand titles and 50% on EDI titles.
- LDAC was presented with a draft of MCFLS Marketing Plan. Because it is impossible to target all audiences at once, STIR proposed starting with patrons seeking job resources, parents of elementary and high school students, patrons seeking access to life-long learning resources. They recommend focusing efforts on marketing electronic resources available to every county resident, including Gale Courses, Transparent Language and Learning Express Library. The directors also discussed the proposed roll-out plan and requested that the County Executive or a hybrid of suburban and City of Milwaukee leaders be tapped to help with the rollout rather than Mayor Barrett.
- LDAC will continue to meet virtually until June. Beginning in July, the committee will use a hybrid method to allow attendees to join the meeting in person OR virtually.
- MCFLS will be sending out a poll to member libraries to see if there is a different time for the LDAC monthly meetings due to a long-standing conflict with one of the member libraries schedule.

### **Technology**

- MCFLS Staff has created at ILS Review Task Force. Next steps are developing a timeline and setting a meeting schedule. The task force will meet at least once per month.
- Additional e-rate funding has been included in the COVID relief bill currently before Congress. The addition funding must be used to provide internet access outside library buildings. If it passes, applications will be available in June. Libraries wishing to apply will need to determine how to provide filtered internet access in order to be eligible for grant funding.

### **Informational**

- The final candidates for the Network Administrator / PC Support Specialist Search are being interviewed the week of March 1. Hopefully an offer can be made, and accepted, the week of March 8.

### **Additional Agenda Items**

- Congratulations to all the member libraries for submitting their annual reports by the March 1 deadline.

### **Member Library Updates**

- Oak Creek is working with the Sikh Temple of WI to create a collection on Sikhism at the library. We will be starting with titles that will introduce non-Sikhs to the religion and hope to continue to grow the collection to include books in both English and Punjabi in the future.
- Both Greenfield and Shorewood are working with AARP to provide contactless tax assistance this year.
- Shorewood and Oak Creek both added Hot Spots to their collections in the past month.
- Wauwatosa is in the midst of some remodeling. They are updating the restrooms in the kid's area to become family restrooms, adding a lactation room to their children's department, adding solar panels to the roof and painting many of their meeting rooms.
- Beginning in April, St. Francis is launching a homebound delivery service.
- Hales Corners will be restarting their in-person book discussion book group at Forest Ridge Senior Community.
- South Milwaukee's new director starts on Monday, March 8.
- Brown Deer will be opening their drive through on March 5. The rest of the building will open to the public later in the month, once they receive the self-checkout machines and security gate.

M.C.F.L.S.  
Financial Report  
For the Two Months Ending February 28, 2021

1		<u>Annual Budget</u>	<u>Year to Date</u>	<u>%</u>	<u>Balance</u>	<u>%</u>
2						
3	<b>General Revenues</b>					
4	State Aid Revenue	\$ 2,855,319	\$ 2,141,489	(75.00)	\$ 713,830	(25.00)
5	Milwaukee County Allocation	\$ 66,650	\$ 58,250	(87.40)	\$ 8,400	(12.60)
6	West Milwaukee Contract -Other	\$ 60,152	\$ 60,152	(100.00)	\$ -	0.00
7	Interest on Invested Funds	\$ 10,000	\$ -	0.00	\$ 10,000	(100.00)
8	Member Forms/Supplies Rev (62)	\$ 20,600	\$ 3,199	(15.53)	\$ 17,401	(84.47)
9	Member Postage Revenue (61)	\$ 23,800	\$ 3,123	(13.12)	\$ 20,677	(86.88)
10	Member OCLC Revenue(73)	\$ 125,035	\$ 102,315	(81.83)	\$ 22,720	(18.17)
11	Member Telecomm. Rev (71)	\$ 16,800	\$ 14,400	(85.71)	\$ 2,400	(14.29)
12	Member III Softwre Maint-Basi	\$ 181,188	\$ 159,712	(88.15)	\$ 21,476	(11.85)
13	Member III Softwre Maint-Other	\$ 47,561	\$ 43,726	(91.94)	\$ 3,835	(8.06)
14	Member Tech. Assist.-Time Rev.	\$ 15,000	\$ 3,156	(21.04)	\$ 11,844	(78.96)
15	Member Special Projects Rev (77)	\$ 75,000	\$ 26,572	(35.43)	\$ 48,428	(64.57)
16	Member Catalog Contract Rev (85)	\$ 187,546	\$ 154,829	(82.56)	\$ 32,717	(17.44)
17	Member Database Rev (56)	\$ 81,035	\$ 74,878	(92.40)	\$ 6,157	(7.60)
18	Member Catalog Enhance Rev (59)	\$ 29,648	\$ 26,344	(88.86)	\$ 3,304	(11.14)
19	Member Ecom Transaction Fees (44)	\$ 8,600	\$ 1,664	(19.35)	\$ 6,936	(80.65)
20	TNS Calls/Notices Revenue (45)	\$ 1,224	\$ 287	(23.45)	\$ 937	(76.55)
21	Carryover Revenue	\$ 12,000	\$ -	0.00	\$ 12,000	(100.00)
22	Staff Benefits/Co-Pay Revenue	\$ 38,289	\$ 4,786	(12.50)	\$ 33,503	(87.50)
23	LSTA Technology Grant Rev (89)	\$ 10,000	\$ -	0.00	\$ 10,000	(100.00)
24	Member Digital Content Rev (90)	\$ 267,583	\$ 233,555	(87.28)	\$ 34,028	(12.72)
25	Member PC Mngmt License Rev (94)	\$ 2,545	\$ 644	(25.30)	\$ 1,901	(74.70)
26	Member MKE Mixers Rev (95)	\$ 1,400	\$ 1,250	(89.29)	\$ 150	(10.71)
27	Member Replacement Fines Rev (96)	\$ 12,000	\$ 2,846	(23.72)	\$ 9,154	(76.28)
28	Member Overdrive Advantage Rev (97)	\$ 15,000	\$ 103,289	(688.59)	\$ (88,289)	588.59
29	<b>Total General Revenues</b>	\$ 4,163,975	\$ 3,220,466	(77.34)	\$ 943,509	(22.66)
30						
31	<b>Special Revenues</b>					
32	W. Milw Borrowing Rev (101)	\$ 31,467	\$ 31,467	(100.00)	\$ -	0.00
33	Ecommerce Revenue (103)	\$ 175,000	\$ 37,322	(21.33)	\$ 137,678	(78.67)
34	<b>Total Special Revenues</b>	\$ 206,467	\$ 68,789	(33.32)	\$ 137,678	(66.68)
35						
36	<b>Total Revenues</b>	\$ 4,370,442	\$ 3,289,255	(75.26)	\$ 1,081,187	(24.74)
37						
38		<u>Annual Budget</u>	<u>Year to Date</u>	<u>%</u>	<u>Balance</u>	<u>%</u>
39						
40	<b>General Expenditures</b>					
41	Fringe Benefits Expense	\$ 195,231	\$ 30,814	15.78	\$ 164,417	84.22
42	Salaries Expense	\$ 389,272	\$ 56,974	14.64	\$ 332,298	85.36
43	Telephone Renewal Expense	\$ 608	\$ 58	9.54	\$ 550	90.46
44	Member Ecom Transaction Ex (19)	\$ 8,600	\$ 582	6.77	\$ 8,018	93.23
45	TNS Calls/Notices Expense (20)	\$ 1,224	\$ 116	9.48	\$ 1,108	90.52
46	Mileage/Auto Maint Expense	\$ 700	\$ -	0.00	\$ 700	100.00
47	Conference/Training Expense	\$ 5,000	\$ 339	6.78	\$ 4,661	93.22
48	Memberships Expense	\$ 5,000	\$ 3,560	71.20	\$ 1,440	28.80
49	Continuing Education Expense	\$ 9,000	\$ -	0.00	\$ 9,000	100.00
50	Office Supplies Expense	\$ 1,500	\$ -	0.00	\$ 1,500	100.00
51	Copy Machine Maint. Expense	\$ 2,500	\$ -	0.00	\$ 2,500	100.00
52	MCFLS Printing Expense	\$ 500	\$ 262	52.40	\$ 238	47.60
53	MCFLS Printing for Mem Expense	\$ 5,000	\$ -	0.00	\$ 5,000	100.00
54	MCFLS WI Pub Lib Consortium Ex	\$ 5,855	\$ -	0.00	\$ 5,855	100.00
55	MCFLS Buying Pool	\$ 140,000	\$ -	0.00	\$ 140,000	100.00
56	MCFLS Database Expense	\$ 21,953	\$ -	0.00	\$ 21,953	100.00
57	Member Database Expense (17)	\$ 81,035	\$ 34,010	41.97	\$ 47,025	58.03
58	MCFLS Catalog Enhancement Expe	\$ 81,119	\$ 47,877	59.02	\$ 33,242	40.98
59	Member Catalog Enhance Exp (18)	\$ 29,648	\$ 9,648	32.54	\$ 20,000	67.46
60	MCFLS Postage Expense	\$ 600	\$ 1	0.17	\$ 599	99.83
61	Member Postage Expense (9)	\$ 20,600	\$ 550	2.67	\$ 20,050	97.33



M.C.F.L.S.  
Financial Report  
For the Two Months Ending February 28, 2021

62	Member Forms/Supplies Exp (8)	\$ 23,800	\$ 9,314	39.13	\$ 14,486	60.87
63	Telephone Expense	\$ 5,000	\$ 370	7.40	\$ 4,630	92.60
64	Meetings Expense	\$ 500	\$ -	0.00	\$ 500	100.00
65	Insurance Expense	\$ 11,700	\$ 3,898	33.32	\$ 7,802	66.68
66	Legal Expense	\$ 500	\$ -	0.00	\$ 500	100.00
67	Audit Expense	\$ 13,000	\$ -	0.00	\$ 13,000	100.00
68	Payroll Service Expense	\$ 5,400	\$ 614	11.37	\$ 4,786	88.63
69	III Software Support Expense	\$ 228,749	\$ 113,418	49.58	\$ 115,331	50.42
70	III TNS Subscr Exp	\$ 12,224	\$ 6,112	50.00	\$ 6,112	50.00
71	Member Telecomm. Expense (11)	\$ 16,800	\$ -	0.00	\$ 16,800	100.00
72	MCFLS Telecomm. Maint. Expense	\$ 5,000	\$ 219	4.38	\$ 4,781	95.62
73	OCLC Expense (10)	\$ 135,047	\$ 133,944	99.18	\$ 1,103	0.82
74	MCFLS Computer Room Equipment	\$ 5,000	\$ 176	3.52	\$ 4,824	96.48
75	MCFLS Software Expense	\$ 3,500	\$ 413	11.80	\$ 3,087	88.20
76	MCFLS Equipment Expense	\$ 16,000	\$ -	0.00	\$ 16,000	100.00
77	Member Special Projects Exp (15)	\$ 75,000	\$ 3,591	4.79	\$ 71,409	95.21
78	Sorting and Delivery Expense	\$ 291,700	\$ 19,696	6.75	\$ 272,004	93.25
79	South Central Delivery Expense	\$ 21,856	\$ -	0.00	\$ 21,856	100.00
80	Auto Payment/Maintenance Exp.	\$ 1,000	\$ -	0.00	\$ 1,000	100.00
81	MPL Resource Contract Expense	\$ 178,457	\$ -	0.00	\$ 178,457	100.00
82	MPL Rent Lease Contract Exp.	\$ 129,815	\$ -	0.00	\$ 129,815	100.00
83	ILS Expense	\$ 36,450	\$ -	0.00	\$ 36,450	100.00
84	MCFLS Catalog Cont Exp to MPL	\$ 256,979	\$ -	0.00	\$ 256,979	100.00
85	Member Catalog Contract Exp (16)	\$ 187,546	\$ -	0.00	\$ 187,546	100.00
86	MCFLS Collection Dev Tool Exp	\$ 25,935	\$ -	0.00	\$ 25,935	100.00
87	Internet Expense	\$ 21,635	\$ 1,417	6.55	\$ 20,218	93.45
88	Contingency Expense	\$ 33,411	\$ 229	0.69	\$ 33,182	99.31
89	LSTA Technology Grant Exp (23)	\$ 10,000	\$ -	0.00	\$ 10,000	100.00
90	Member Digital Content Exp (24)	\$ 267,583	\$ 30,000	11.21	\$ 237,583	88.79
91	Marketing	\$ 10,000	\$ -	0.00	\$ 10,000	100.00
92	Marketing Consultant/Contract	\$ 40,500	\$ -	0.00	\$ 40,500	100.00
93	Cooperative Purchasing Sub Exp	\$ 2,200	\$ -	0.00	\$ 2,200	100.00
94	Member PC Mngmt License Ex (25)	\$ 1,875	\$ -	0.00	\$ 1,875	100.00
95	Member MKE Mixer Exp (26)	\$ 1,400	\$ -	0.00	\$ 1,400	100.00
96	Member Replacement Fines Exp (27)	\$ 12,000	\$ -	0.00	\$ 12,000	100.00
97	Member OverDrive Advantage Exp (28)	\$ 15,000	\$ 90,000	600.00	\$ (75,000)	(500.00)
98	<b>Total General Expenditures</b>	\$ 3,107,507	\$ 598,202	19.25	\$ 2,509,305	80.75
99						
100	<b>Special Expenditures</b>					
101	W. Milw Borrowing Exp (32)	\$ 31,467	\$ 31,467	100.00	\$ -	0.00
102	RB - MCFLS Payment Expense	\$ 1,056,468	\$ 1,056,467	100.00	\$ 1	0.00
103	Ecommerce Expense (33)	\$ 175,000	\$ 37,322	21.33	\$ 137,678	78.67
104	<b>Total Special Expenditures</b>	\$ 1,262,935	\$ 1,125,256	89.10	\$ 137,679	10.90
105						
106	<b>Total Expenditures</b>	\$ 4,370,442	\$ 1,723,458	39.43	\$ 2,646,984	60.57
107						
108	<b>Revenue/Expenditures +/-</b>		\$ 1,565,797			



# MEMO

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March 9, 2021

To: Milwaukee County Federated Library System Board of Trustees

From: Joan Johnson, Milwaukee Public Library Director

RE: 2020 - Resource Library Annual Report

The Milwaukee Public Library (MPL) is honored to serve as the Resource Library for the Milwaukee Federated Library System, providing backup reference, consulting and other services included in the 2020-2024 Resource Library Agreement (Agreement) effective January 1, 2020.

As agreed, an annual activities dashboard report (Dashboard) has been prepared and is part of your packet today. To provide an overview of all the services we provide we have included data for Interlibrary Loan (ILL) services, which is covered under a separate agreement.

In 2020, the year that marked the beginning of the Covid-19 pandemic, the most important thing libraries could do for patrons is provide digital access to resources and content, and other contactless services until it's safe to fully reinstate in-person services. In lieu of this, MPL focused on increased investments using CARES Act funding for technology and equipment for staff to provide remote services and virtual programming. MPL also increased its purchases of downloadable digital content for the Overdrive Advantage account serving Milwaukee County. Ultimately, MPL invested \$205,000 in 2020 to provide additional and more diverse content for city and county residents to meet greater demand, up by 19%.

The following summarizes additional highlights from the report:

#### Access to Digital Resources

The LibraryNOW library card campaign became more important than ever to support students and teachers forced into using remote learning tools since March of 2020. The MPL is helping them stay connected via their virtual MPL accounts. The program serves over 60,000 students and includes about 250 non-Milwaukee students. A detail by city is shown on the dashboard.

Visits to the MPL Digital Library & Recollection WI page were up about 40% and served 7,000 MCFLS patrons. Visits to MPL's new web page, the "MPL COVID-19 Resource Portal" is highlighted on the dashboard and shows modest usage by city and county residents.

#### Training and Consulting

With the exception of one session which happened virtually, the few examples from 2020 occurred in person prior to the pandemic. MPL staff provided three sessions on the LibraryNOW library card campaign, one for WLA Literary Awards and one on security. This is a significant reduction from previous years due to the suspension of in-person events during the pandemic.

#### Reference transactions, retrievals and circulation

There was a drop in all categories due in part to the fact that for several weeks, no services were being provided. A one-week survey (usually there are two) of in-person, phone, virtual chat and E-mail reference services indicates that MPL staff have been able to serve over 5,800 suburban residents, just under 2000 from outside the County, and about 700 out of state. Retrieval requests are received by phone and in-person for materials stored in open and

closed stacks, serving just under 400 suburban residents. MPL circulated 204,344 items to patrons who picked up their items at suburban locations. In the reverse, stats show that the number of items from the various suburban locations that were checked out at MPL locations was 112,082 items. There was virtually no change in the percentages of each between the two years. The data does not include when an item is checked out from its home-based branch.

#### Unique Public Computer Users

New this year is the metric around public computer use which all members can track. The dashboard shows modest use of MPL desktops and laptops by suburban patrons detailed by city.

#### Tours, Programs and Outreach

Due to the suspension of in-person programming only ten weeks into the year, the reported figures reflect a significant decrease in the number of programs and attendees. However, we found a new audience of avid consumers of virtual programming. We are unable to parse the data at a more granular level, but to illustrate how far the reach of our programming goes, please see table inserted below:

#### *Views of MPL Programs on YouTube*

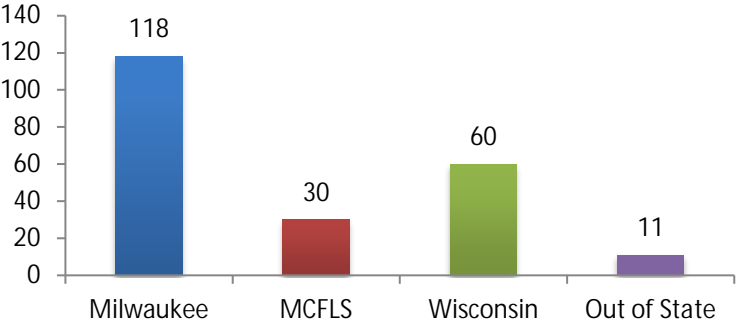
Geolocation	Views	Watch Hrs.
Wisconsin	5,277	143.9
National (Excl. WI)	9,775	357.5
Global (Excl. US)	3,401	102.2

C: Michelle Bria, Milwaukee Public Library Board President  
Steve Heser, MCFLS Executive Director  
Joan Johnson, MPL Deputy Library Director



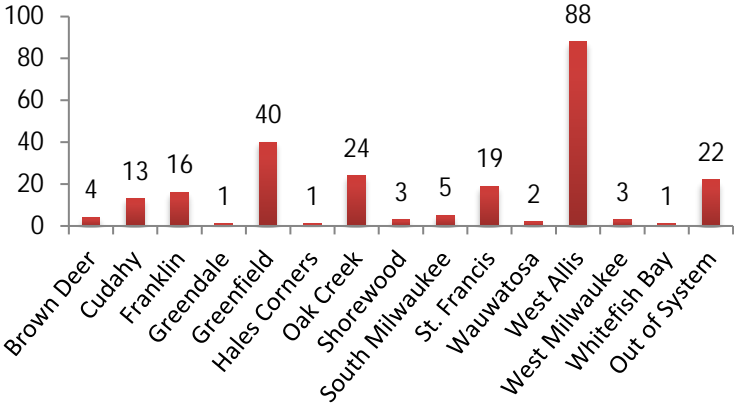
2020 Resource Library Dashboard

Tours and Visits of MPL - Attendees  
Attendees by Residency Type;  
25 Tours/Visits; 34 Hours Total

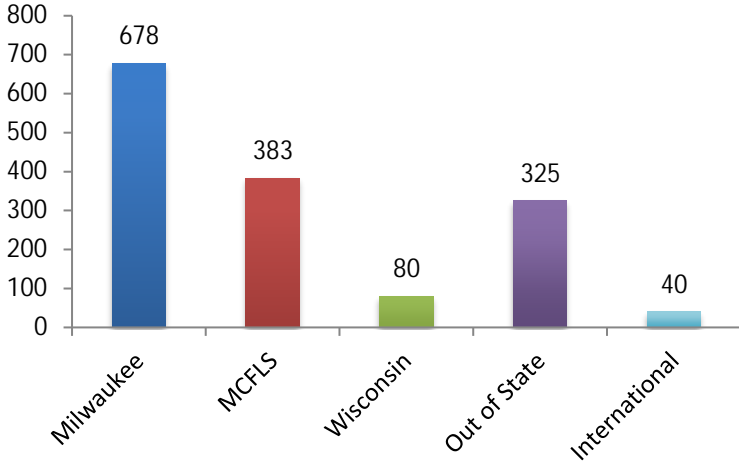


- Department of Workforce Development, PBS Tour and Filming, Restorative Justice Circle, Rotunda Photos

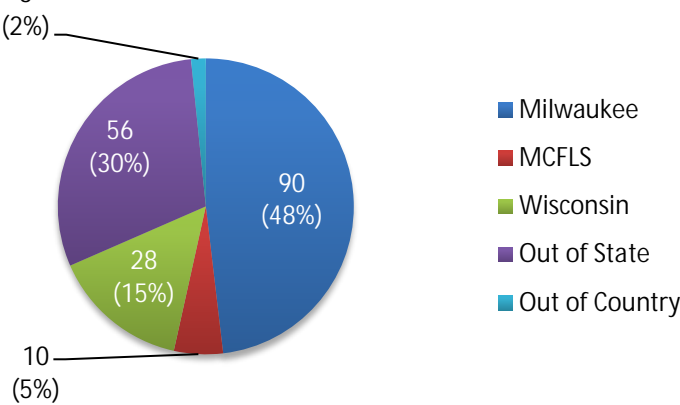
LibraryNOW Accounts  
for St Elizabeth Ann Seton of West Allis  
242 Total Non-Milwaukee Students by City,  
Including 88 West Allis Students



Visits to MPL's COVID-19 Resource Portal  
Web Sessions for [mpl.org/covid19](https://mpl.org/covid19)  
by Residency Type

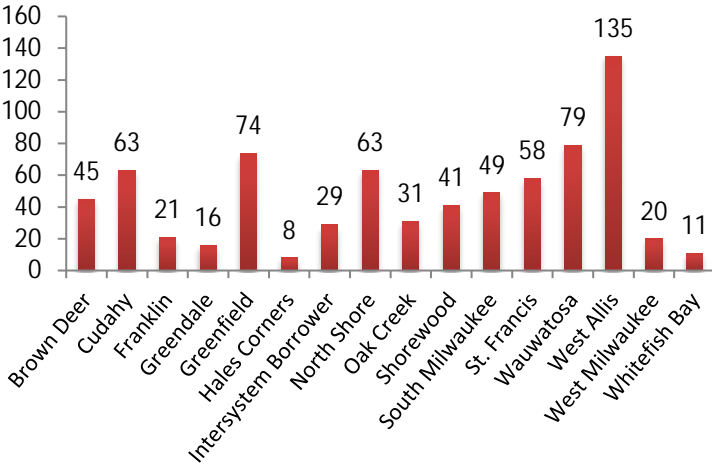


Access to Selected Special Collections

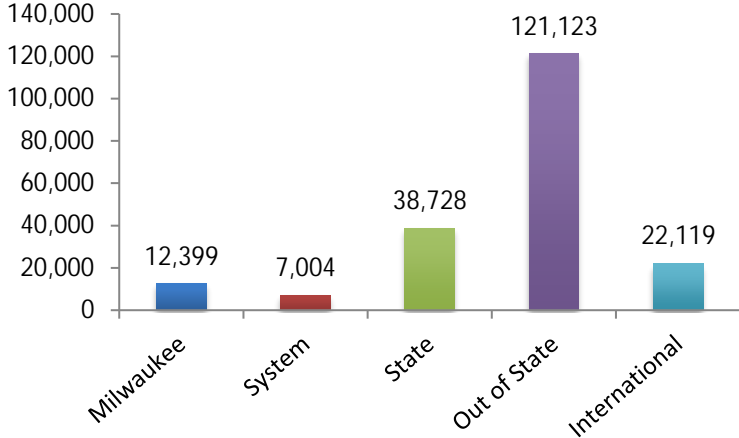


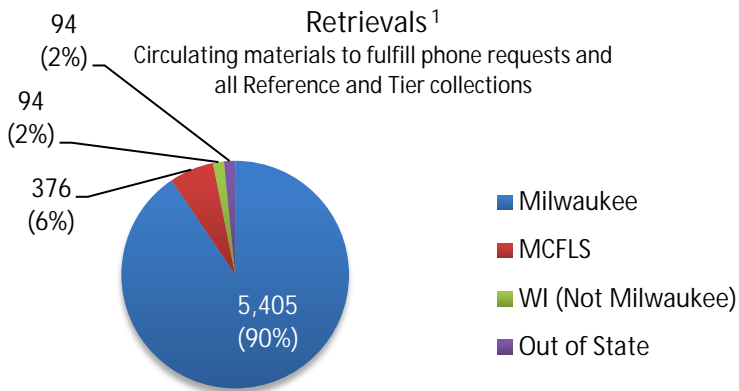
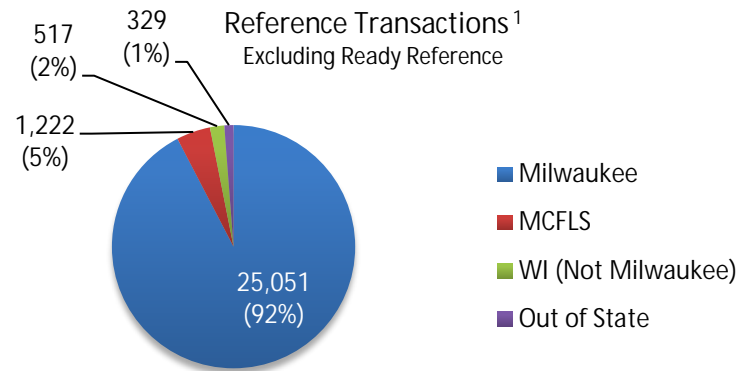
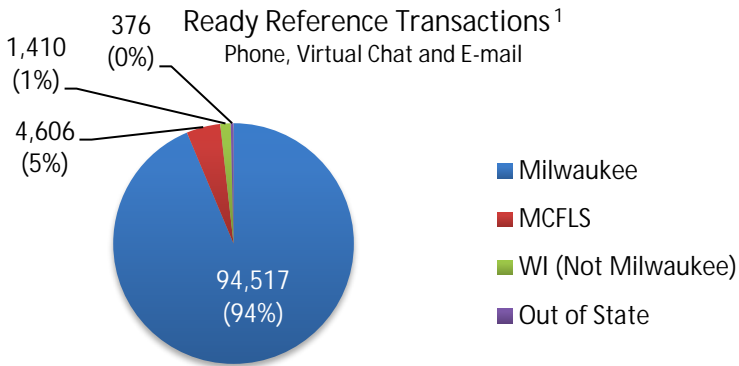
- Archives – City, Archives – MPL, Great Lakes Marine Collection, Historic Milwaukee Performing Arts Collection, Historic Photographs, Humanities Clippings, Local History Collection, Milwaukee Road Collection, Wisconsin Architectural Archive

Unique Public Computer Users  
14,373 Milwaukee Users  
743 Non-Milwaukee Users

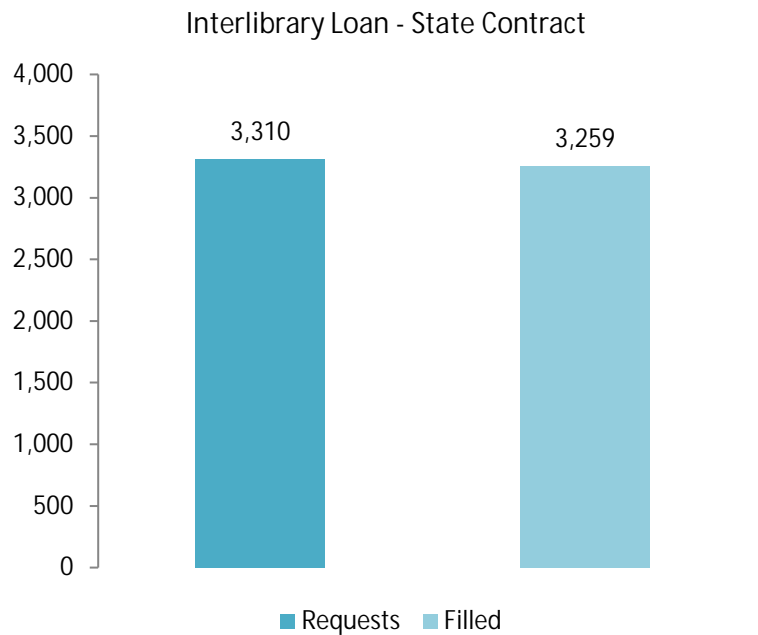
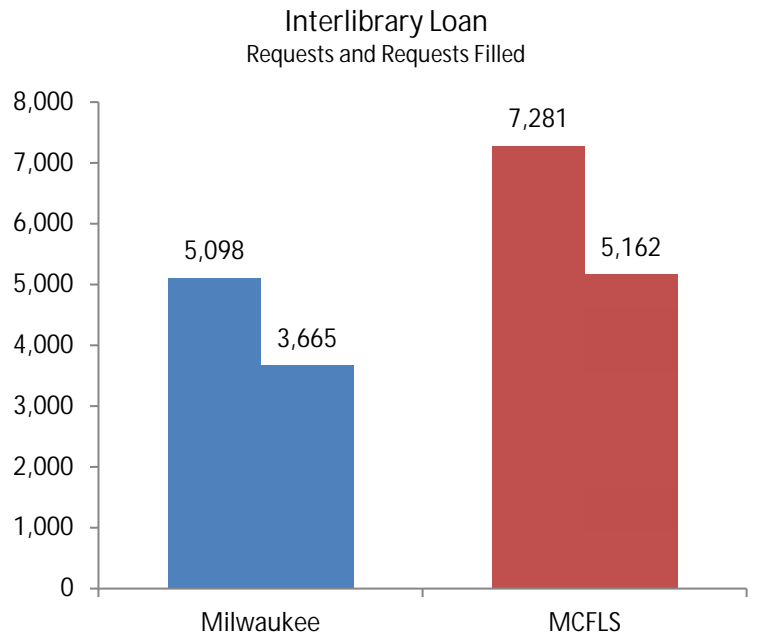
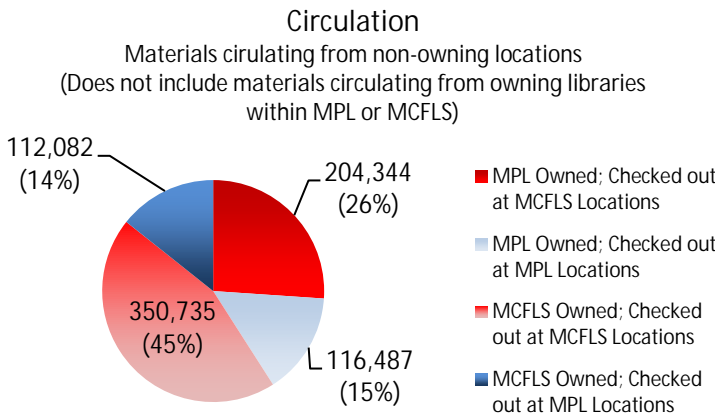
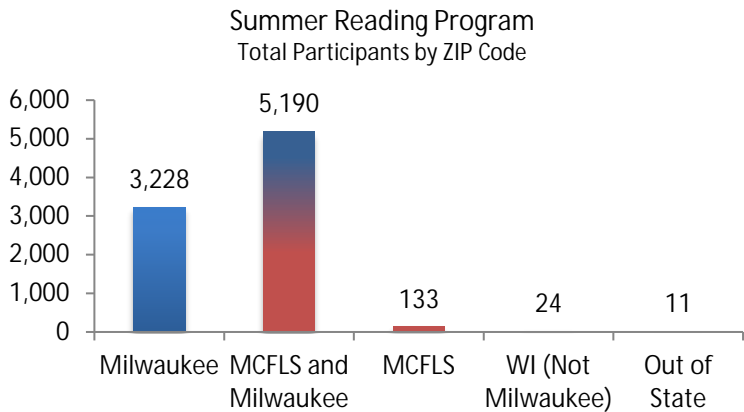
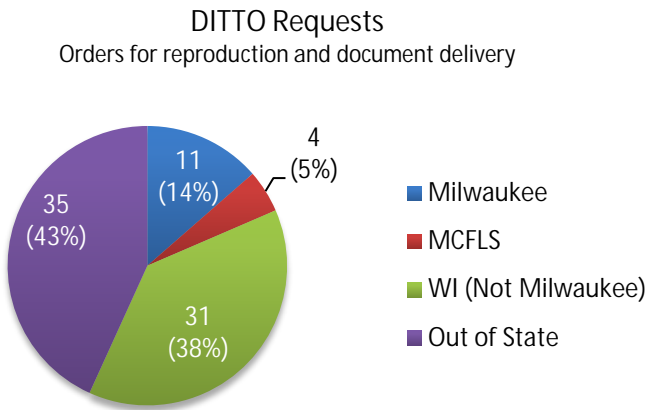


Visits to MPL Digital Library & Recollection WI  
Web Sessions for [content.mpl.org](https://content.mpl.org)  
by Residency Type





<sup>1</sup> One-week survey conducted in October multiplied by weeks open: 47.





# MILWAUKEE COUNTY FEDERATED LIBRARY SYSTEM MARKETING PROPOSAL

UPDATED: MARCH 9, 2021

Prepared by STIR Advertising and Integrated Messaging

DRAFT



## OVERVIEW: SECTION I

Milwaukee County Federated Library System (MCFLS) seeks to invigorate library use among all cultural and demographic groups in our community with emphasis on those who need access to job and educational resources. MCFLS aims to expand awareness of and access to new and valuable library services that many are not aware of - creating interest and engagement by non or light library users as well as regular library users.

MCFLS is identifying and recommending system-wide marketing strategies that will drive overarching marketing support and provide leadership and a roadmap for tactical execution by individual libraries. Ultimately, we want to create consistent messaging and strategy that leads to a well-coordinated and engaging campaign.

**Segmentation and Prioritization:** While MCFLS serves the entire population, its modest marketing resources must be focused and channeled to where the greatest, most immediate benefit can be derived and to feature services that will be most effective at changing perceptions of the library system in a positive way.

**COVID-19:** The pandemic has altered opportunity and expectations about the library. For the immediate future, the library cannot be positioned as a community gathering place for all. Yet it still represents an immediate remedy for 'digital divide' concerns. The prioritized services and audiences that have been chosen below take into consideration on-site and online usage and their relative importance to at-risk populations.

**Research:** In a meeting of the marketing committee, there was a consensus leading us to believe that the priorities outlined in this plan are clear and there is not a pressing need for incremental research at this time.





## PLAN OUTLINE: SECTION II

### Marketing Objectives:

- Reinforce MCFLS/member library relationships with current patrons to increase use of these services as well as engage prospective new patrons. The goal will be to review current usage numbers against post-campaign results to determine the success of the campaign.
- Change / improve perceptions of MCFLS member libraries as places that provide valuable services – whether at home, within libraries or online – that directly benefit the economic outlook / quality of life of those who participate at no charge.
  - Job hunting
  - Education
  - Lifelong learning
- Create awareness that MCFLS member libraries provide job hunting and training skills and educational resources that can be accessed on-site free of charge.
  - Gale Courses
  - Transparent Language
  - Learning Express Library
- Drive & track usage of Gale Courses, Learning Express Library, Transparent Language from remote log in (primary) and on-site (secondary).

### Target Audiences:

There are three key audiences within the Greater Milwaukee Area, one for each service:

1. Job hunting [Gale Courses/LearningExpress Library]: M/F 18-45. No HS, HS, 2yr degree, Some college. Unemployed or underemployed. This audience is less likely to have an established relationship with a home library and reaching them will be important.
2. K-12 Education Resources: Parents of elementary and high school students. \$30K - \$60K HHI.



3. Lifelong Learning resources (Learning Express, Transparent Language, Gale Courses)  
- Adults and youth with an interest in world languages learning and lifelong learning.

## Positioning

*For those who seek greater job and educational opportunities, especially those in underserved communities, your library is there to connect you to the tools/resources needed for a better life.*

MCFLS member libraries aim to serve people with dignity by providing access to life-changing tools and critical information that improve skills and help find jobs.

## Marketing Strategy

The following are marketing recommendations and guidelines from which a campaign can be written, produced and executed.

### Digital | Mobile First

Key objectives of the campaign will be to drive traffic to a MCFLS library website landing page and then direct to other pages or specific resources from there. This would be accomplished primarily via social and digital advertising. Research shows that even among low-income and under-employed people, smart phone ownership indexes high.

Who is smartphone dependent: Reliance on smartphones for online access is especially common among younger adults, non-whites and lower-income Americans. Smartphones also index high among adults 25-54.

Therefore, a strong, targeted mobile-first strategy makes sense as a primary vehicle for promotion along with the following recommendations. We would expand into desktop ads for the “language learning” audience as those searches may also be conducted on a computer.

The following are key marketing platforms in order of applicable priority:

1. PUBLIC RELATIONS/COMMUNICATIONS TOOLKIT
2. ORGANIC SOCIAL



3. SOCIAL ADVERTISING
4. EMAIL MARKETING
5. WEBSITE UPDATES
6. DIGITAL ADVERTISING
7. TRANSIT (OPTIONAL, BASED ON BUDGET)
8. LIBRARY COLLATERAL
9. COMMUNITY OUTREACH/PARTNERSHIPS

### **Communications Strategy**

Promote the resources available at libraries that are perception changers including those that best illustrate the uplifting benefits that library use can provide. Librarians and staff are an important part of making these tools accessible and understood. It's a combination of the electronic resources and the human connection. As appropriate, also communicate the COVID-19 safety protocols in place that make the library a safe place to visit as that changes over time.

## **MESSAGING: SECTION III**

Consistently capture the link between the library and upward mobility in all communications.

- The support and electronic resources provided beyond books
- Improving one's life situation
- Detail the benefits of each featured software service
- Emphasize that it's free and accessible



- Demonstrate its effectiveness through testimonials and stories
- Promote use of resources and provide links to library system and member libraries, as required

## **Key Messages**

The following are some initial key messages that will help position a unified approach through this integrated campaign. These would be interwoven into advertising, paid and organic social, website landing page, public relations and outreach. These messages are high-level and can be a starting point for MCFLS's new communication person.

## **Overarching messages**

- Now more than ever, Milwaukee County residents need support to help them with job and educational resources that will help you achieve your life goals.
- Public libraries in Milwaukee County go well beyond books to offer a wide range of resources that will help you achieve your life goals - no matter where you live, work or learn.
- That's why public libraries in Milwaukee County are launching a public awareness campaign to make residents aware of three free and easy-to-use tools that will help residents of all ages – Gale Courses, LearningExpress Library and Transparent Language.

## **Gale Courses**

- Your library is launching the “\_\_\_\_\_”: (insert theme line) campaign to bring awareness to the free and easily accessible virtual education and job resources.
- Gale Courses are free online six-week courses that help you learn or brush up your skills in a wide variety of subjects. There are over 350 courses to choose from business and technology to parenting, hobbies, wellness and much more.



- Gale courses offer a great tool for those currently seeking to improve their job skills or get help with resume-building.
- Learn at your own pace from experienced instructors with content accessible to beginners as well as more advanced students.
- Gale Courses are available at all branches of the public libraries in Milwaukee County
- To learn more, reach out to visit (link to new landing page.)

### **Transparent Language**

- The pandemic has meant a lot more time alone for many as well as more time for learning. During the last year, use of language apps has spiked. During 2020, interest in world language learning has spiked and for those who've always wanted to learn a language, now may be a great time to tackle that long-neglected goal.  
<https://www.bbc.com/worklife/article/20201230-why-are-we-learning-languages-in-a-closed-world>
- During National Library Week, your public library is launching the “\_\_\_\_\_” campaign to make Milwaukee County residents aware of a free resource called Transparent Language.
- This free and easy-to-use virtual tool offers 110 languages and 16 English-as-a-Second-Language modules.
- Transparent Language is the perfect tool to improve anyone's language skills for school, travel, international business or cultural awareness.
- 37 additional languages (besides English) offer training designed for Latin American Spanish speakers.
- New arrivals to the U.S. can use this tool to study for citizenship with the American Citizenship Test Prep Course, by changing the learning language to “English” and selecting “Browse.”
- Transparent Language is available at all public libraries in Milwaukee County.
- To learn more, reach out to visit (link to new landing page.)

### **LearningExpress Library**



- LearningExpress helps students and adult learners improve skills required for academic and career success.
- The platforms provide a comprehensive selection of educational resources—including interactive tutorials, practice exams, flashcards, articles and e-books—for basic skills mastery, academic success, job preparation, and career advancement.
- Targeted learning centers can help students prepare for a variety of academic testing such as GED® ACT®, SAT®, AP®

## CAMPAIGN STRATEGY/TACTICS: SECTION IV

STIR has been tasked to generate high level strategies and tactics that will help MCFLS achieve the goals outlined above in the most expedient way. The following is a detailed action plan. Execution against these would require incremental funding.

### THEMELINE RECOMMENDATION

- Create an overarching campaign theme that serves as an umbrella for promoting all three resources and builds excitement with the community. We envision MCFLS as the umbrella organization which would funnel patrons to resources at their local libraries.



- The theme should capture the essence of the brand positioning 'Connect to library resources that will help you succeed at work, school and life.' Please keep in mind that this is an internal positioning line which will be the starting point to develop the campaign theme line.
- Because this is an important process that takes some time, this is something we've estimated in the budget as a next step and something we could help you with to set the framework for a successful campaign.
- Potential theme line options should then be vetted with library marketing staff / volunteers / stakeholders, to ensure alignment and ownership before implementation.

## **BRAND SYSTEM**

- As part of the campaign, STIR recommends development of some type of rebrand MCFLS logo.
- Branding will be for MCFLS with materials flexible enough to be used by any member library.
- This will help establish consistency among all the library branches for all communications.

## **PR RECOMMENDATIONS**

Develop a PR plan that leverages storytelling around these resources to spotlight positive outcomes and, as possible, share testimonials from the target audience. This will include press kit and story pitches that can be implemented by individual libraries and is designed to produce extensive coverage and drive interest and share the overarching message of life-changing connections that can be found at the library system/local library.

- Create an online press kit that includes the following:
  - Launch press release announcing the library's new public awareness campaign to promote the many free job and education resources available.



- Fact sheets on each resource: Gale Courses, LearningExpress Library and Transparent Language with links to more information. Include key unemployment stats locally which emphasize the need for these resources. Currently unemployment is hovering around 5% with hospitality and travel industries taking the worst hit.
  - A list of job and educational resource favorites from these courses from each member library director/executive director.
  - Toolkit with resources will also be created for library members (see toolkit).
  - Testimonials from a few people who have used each of the three resources. (member libraries will need to help come up with individuals or families) Sharing actual results will be helpful but this may need to happen more towards middle of the year.
- Determine a campaign spokesperson, such as Jen Schmidt, who will serve as the unified voice for the public libraries in Milwaukee County.
  - Designate system experts who can offer a tip sheet on using the software and getting the most of each of these resources.
  - Work with 1-3 top video savvy library system members to create a YouTube promotional video for each of the three resources which can be shared via social media and publicity. This could also be at the system level.

All of these items would be housed on a special campaign landing page we recommend be added to the system page and linked to from all member library websites (see website recommendation).

STIR recommends development of comprehensive local media lists that can be used by the system and shared with member libraries, as needed. This list will include:





- Local business and lifestyle media outlets – print, online, TV, radio and podcasts. Some key reporters to target include the following (this is just a sampling and targeted contacts would vary based on pitch:
  - Journal Sentinel: Jim Higgins, Books/Entertainment, Amy Schwabe – Wisconsin Family
  - Business Journal: Sari Lesk
  - BizTimes: Lauren Anderson
  - Onmilwaukee
  - Urban Milwaukee
  - Milwaukee Magazine
  - Community Newspapers (targeted by member libraries)
  - TV – Spectrum News, Fox 6, WISN, WTMJ4, WDJT 58
  - Wisconsin Public Radio – Larry Meiller Show
  - WUWM – Lake Effect

#### Campaign Kick-off To-Be-Determined

- MCFLS will select a kick-off timeframe based upon when a staff or contract person is hired but also based upon relevant timing when school is in session. Most likely, it seems we are looking at a late summer or back-to-school timeframe for this launch.
- Leverage MPL's connections to team up with the County Executive David Crowley – to get a special day designation for the library to kick off the campaign. Check to see if you can get the County Executive to make a short video announcement and encourage residents to go to the landing page for these free resources.
- Look at the Intergovernmental Cooperation Council to promote the event so that you are reaching all the mayors/village presidents in the county.
- Schedule free one-hour virtual tutorial sessions set up via Zoom throughout the launch month for each of the key resources - Gale Courses, LearningExpress Library and Transparent Language.



- Reach out well in advance to key community leaders, public policy influencers, funders and legislators, MPS staff and school-related leaders and other local influencers to get them on board with the campaign and have them announce it on their social channels at the same time during the kick-off. Some initial ideas include:
  - Bailey Coleman – WKKV
  - Sandra Dempsey – Estamos Unidos US
  - Homer Blow, Program Director of WNOV 860 Radio, founder of [blowradio.com](http://blowradio.com)
  - Bria Grant, founder of Unite WI
  - JoAnne and Maanan Sabir (business owners/Sherman Phoenix)
  - Darius Smith, co-founder of Black Space
  - Juan Ruiz - Deputy Director, United Community Center
  - Laura Gutiérrez - Executive Director, United Community Center
  - Carole Meekins – WTMJ4 – Positively Milwaukee host
  - Diana Gutierrez – WISN12 – new anchor joining the team in early January or Toya Washington WISN12 anchor
  - Sam Kraemer or Carl Deffenbaugh – Fox 6 reporters
  - Goodwill Workforce Connection Centers
  - Suburban School District Influencers
- Develop story pitches throughout the year based on input from public libraries and a concerted effort to look for testimonials. Some pitch angles include:
  - Pitch news about overarching public awareness campaign launch and the importance of these resources to the community.
  - Pitch a feature story with a family with young children who can speak to how Gale Courses or LearningExpress Library helped kids stay on track with learning during a challenging year.



- Pitch a feature story with a senior who has been learning a world language in preparation for a long-time planned trip post COVID-19. Talk about spike in language learning during COVID-19.
- Another angle could be a senior who learned to be able to better communicate with someone – like a favorite nurse who is bilingual – or a teacher who was looking to be able to communicate more effectively with their bilingual students.
- Pitch an in-person or virtual reading of a popular book in a different language, like Spanish, and discuss how stories can be a powerful tool in learning a new language
- Pitch news around how speaking a second language can provide a competitive edge in career choices to highlight Transparent Language program.
- Pitch a 'Beyond the Game' story about how Gale Courses and Learning Express Library helped a star student athlete keep up good grades. Pitching near a big game, like the State Championships, or graduation ceremony will help increase media interest.
- Pitch news around how a particular industry, like hospitality or travel, is using JobNow/Gale, etc. to re-skill during COVID-19.
- Spotlight how Learning Express are helping students virtually prep for ACT/SAT or GED.

Other guerrilla marketing PR ideas:

- Urban librarian brigade/bringing the library to you --> this already exists elsewhere so we'd have to put our own Milwaukee spin on it, but it would be great to get librarians out in the community to talk about/demonstrate these resources; play up the old-school librarian meets the future with the typical librarian outfit but instead of a trunk full of books maybe it's a trunk full of computers



- Little free libraries go high tech: Create a fun grassroots effort using the little free libraries around town to promote high tech learning at the library. Post a cute little temporary sign on each that says this little library now has free wifi and can help you learn and find a job – post a scan that takes you to the campaign landing page.

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## COMMUNICATION TOOLKIT RECOMMENDATIONS

Create a toolkit of 'starter' tactical marketing pieces that can be used, studied and extended by member libraries. Materials in the marketing toolkit should include but are not limited to:

1. **One umbrella positioning message/theme** so all library stakeholders are talking about the campaign resources in a clear, cohesive and unified way. This is the positioning statement "Connect to library resources that will help you succeed at work, school and life" along with the theme line to be developed. Everyone should be able to describe it and communicate it accurately and easily. Once completed develop the following:
  - A script front desk should use when checking out patrons
  - A FAQ staff can use when they receive questions about the resources
  - 3-4 library signage elements promoting the campaign (front desk table tent, bulletin, larger A-frame sidewalk sign)
2. **One-page supporting messages document or script** so librarians and other library stakeholders can elaborate on the resources in conversations with:
  - Library patrons
  - Media
  - Audiences/followers on social media
  - Fellow staff
  - Board members
  - Family, friends, community members
3. **One-page How to Promote the [Insert Theme line] Campaign on Social Media** and accompanying collateral materials:
  - Create Facebook, Twitter and Instagram campaign-specific profile and/or cover photos.
  - Provide 4-5 post theme ideas per channel, such as sharing relevant quotes about libraries that connect back to the resources like: "Google can bring you back 100,000 answers, a librarian can bring you back the right one" or, "A library is all the university you will ever need."



- Create 3-5 campaign-specific image assets for posts per channel.
- 4. **One-page How to Promote the [Insert Theme line] Campaign in the News** and accompanying collateral materials:
  - Create a template news release each library can use as events/stories arise.
  - Create a sample event calendar listing and online sites where posting is free.
  - Provide 2-3 story theme ideas per channel (print/online, radio, TV) that would catch media interest.
- 5. **One-page How to Promote the [Insert Theme line] Campaign in the Community** and accompanying collateral materials:
  - Create flyers or small signs for library staff to put up on free little libraries in their community.
  - Create bulletins for library staff to put up on bulletin boards in their community.
  - Create a sample letter to inform community members of the resources and any associated events.
  - Create a sample public event invite and a list of the type of events libraries could host to promote these resources, such as:
    - A virtual or in-person session with a local teacher on how she uses LearningExpress Library with her students.
    - A virtual or in-person reading of a popular book in a different language read by a Transparent Language class participant; Spanish would be a good language to start with as Milwaukee has a large concentration of Spanish speakers
- 6. **The [Insert Library Name] Journal/Guestbook** – as a way to gather patron stories/testimonials, gift each library a journal for staff to log stories in each day; a list of prompting questions should accompany the journal to make it easier for staff to elaborate, such as “Did you have any interesting patrons today? Describe them!” “What conversation from the day sticks out in your mind? Tell us about it!” “What did you appreciate most about your time at the library today?” (would also work with patrons)
  - After one month, the marketing director should collect these journals to read through them and see what stories she/he can mine.



## ORGANIC SOCIAL MEDIA RECOMMENDATIONS

Through regularly published content on social media, MCFLS will foster community growth and increase awareness, interest and weekly engagement in non or light library users as well as regular library users. Developing an organic social media campaign model built around core software programs should include social templates and core design elements. This model will be designed to be distributed to other library branches as requested.

Specific goals should include:

- Increase community growth, traffic, and brand awareness through consistent and targeted content, key industry topics and conversations, and additional marketing/brand assets.
  - Improve Brand Awareness
  - Reach/Impressions
  - Community Growth
    - Likes & Followers
  - Engagements
    - Comments/Mentions, Shares, Likes, Clicks, Views
  - Link Clicks -determine to where?
  - Page Visits/Views
- Strengthen brand connection and drive conversations with MCFLS target audiences and manage feedback and customer inquiries. Audiences include:
  - Men / Women ages 18-45
    - No Highschool, Highschool graduates, 2-year degrees, Some college.
    - Unemployed or underemployed
  - Tutoring / Education
    - Parents of elementary and high school students.
    - Lower income - \$30k - \$60k
  - Language Learning



- Men / Women 25 –54
- An interest in language learning for frequent international travel or business

To accomplish the social media goals set, the following objectives are recommended:

- Create opportunities for content consumption to engage the growing community with valuable content including sharable graphics, photography, video, MCFLS assets, written posts/blogs, and events across social channels.
- Execute a mixture of promoted and organic tactics to engage and grow the audiences.
- Measure and analyze all social media activity to ensure effectiveness.
  - Measure effectiveness on a monthly basis and adjust tactics as needed.
- Stick to a consistent tone/voice across all channels.
- Develop a consistent community management policy for all channels.
  - Establish an agreed upon protocol for positive and negative feedback patterns.
  - Achieve a consistent 8-hour or less turnaround on responding to appropriate queries or feedback.

Note: Objectives may be adjusted over time if KPIs are consistently met.

### Social Strategies

- Support coinciding marketing initiatives, partnerships, and key monthly topics
  - Relevant PR activity, influencer partnerships, community events, program highlights.
- Publish a strong content mix to reinforce monthly topics and leverage best content practices for each channel.
- Create content themes to broaden awareness, incentivize engagement, and encourage community growth.
  - Content can be customized for individual locations
    - Specific events
    - Staff spotlights





- Community outreach
- What truly makes each library unique?
- Establish linking strategies to enhance SEO opportunities and visitors' time on site.
- Respond to all comments; provide excellent customer service and direction to visitors.
- Utilize social media outreach to drive conversations and facilitate relationships with our target audiences.
- Implement key hashtags to support the monthly content; in addition, develop a unified brand hashtag for the community to use when sharing content
  - Suggested Example: #MCFLS

## Content Cadence + Calendar

Monthly content schedules will follow a similar structure, with room for organic flexibility.

- Facebook: 3 – 5 posts weekly
- Twitter: 1 – 3 posts weekly
- Instagram: 2 – 3 posts weekly
- This cadence provides enough content to build brand awareness and grow interest in specific programs.
- Content will be tied to approved monthly topic features and be served in a number of content executions to help drive clicks to the website and foster engagement.
  - Video, links driving traffic to specific pages on the website, customer testimonials.
  - A major opportunity also includes highlighting community partnerships and initiatives.



- Content will be developed to coincide with best practices of the channel and be aligned with developed brand standards.

#### Best Times to Post Content (Source: Sprout Social)

- Facebook:
  - The best times to post on Facebook are Wednesday at 9am and Saturday at 5pm.
  - Other notable highly engaged times are Tuesday - Friday at 10am and 2pm.
  - Sunday has the least amount of engagement.
- Twitter:
  - The best time to post on Twitter are Saturday 5 – 6pm
  - The most engaging days to post on Twitter are Wednesday and Friday at 9am.
  - Sunday ranks the lowest for engagement, but still sees higher engagement between 11am and 2pm.

It's important to remember that several factors will affect the overall executions including:

- The individual platform
- The types of content
- Overall social media goals

Below is a sample content calendar that includes multiple content executions.

	FACEBOOK	TWITTER
MONDAY	Link to information regarding job hunting and training assets	Link to information regarding job hunting and training assets
TUESDAY		
WEDNESDAY	Community event announcement	Community event announcement



THURSDAY		
FRIDAY	Program highlight	Program highlight
SATURDAY		
SUNDAY		

## PAID SOCIAL MEDIA RECOMMENDATIONS

The following outlines recommended paid campaigns. It's important to closely monitor the success of each monthly campaign and make the appropriate adjustments accordingly. You should develop a social media advertising campaign model built around key audiences designed to drive awareness and engagement. This campaign will be designed to be distributed to other library branches as requested.

- Approach:
  - Monthly executions featuring a mix of video, ads, and promoted content
  - Ad executions to include the following goals: Awareness, Consideration, Community Growth, Engagement
  - Monthly Ad Executions
    - Facebook/Twitter
      - Traffic
        - Ads highlighting key content driving traffic to the website
      - Engagement
        - Community Growth Campaigns
        - Promoted content
        - Article links
    - Demographics/Location



- Greater Milwaukee area
- TBD target areas
- Utilize target behaviors centered around target audiences
  - TBD based on content executions/focus
  - Measure and Report Metrics (Impressions, clicks, CTR, engagement, video views, community growth, etc.)

Paid social media advertising can target prioritized audiences in key geographies to ensure you're reaching your target audiences. When setting up campaigns, a template creates a model that can be extended at the request of member libraries to new geographies, if requested. Paid social media campaign would reach non-library users and track impressions, engagement, clicks and conversions.

- **Geofenced Targeting** - Targeting social users within a geo-fenced area of each location. Ideally, each Social Advertising Campaign is broken out by particular goals. IE, you run a geofenced campaign, with an ad set targeting an area you know users will visit from, and an ad set targeting a newer area you'd like to tap into.
- **Other Targeting Options** - Campaigns targeting general interests - such as wanting to learn a new language, job searchers, age demographics, etc. are all possible and, again, should be broken out into their own campaigns. Visitor lists can be targeted as well - as long as you have their first and last name, as well as email address.
- **Ad Creative** - Creative (photos/videos) should speak to messaging and targeting when possible. CTA's highly encouraged in ad text and on the ad creative where applicable.
- **Reporting** - Success metrics will vary and will ultimately come down to things like increased foot traffic, new visitors, new registrants, etc. As these metrics are a bit more difficult to track, intent and interest-based metrics may be best. Things like CTR, Bounce Rate, and Time on Site will tell us if A) the targeting in place is the correct audience and B) how effective the ad and landing pages are.
- **Other Notes** - Pixel placement and custom conversion creations will be crucial for properly tracking conversions such as sign ups, downloads, purchases, etc.
- **Lookalike List Targeting** - Taking advantage of various audience lists is incredibly effective. By uploading current member list that contain at least first name, last name, and email address - provided their given email address is tied to their Facebook account



- you can target your ads to current customers/members/visitors. We will need to be careful with this strategy since the library has a reputation of trust – not that we are sharing patron information. You can also exclude members on these lists as well. On top of that, you can create Lookalike audiences Facebook creates for you. Once the original list is created, Facebook's algorithm will develop lookalike audience lists based on current customer data. It is an incredibly powerful tool for advertising purposes.

## SOCIAL MEDIA BUDGET

- Create monthly theme calendar to develop social media content
- Outline community management best practices
- Time social media launch to coincide with PR to maximize awareness

### Paid Social Budgeting

- Facebook
  - Desktop + mobile: \$1,000 - \$2,500 (per month)
    - Estimated daily results:
      - 6,100 - 47,000 users reached
      - 67 – 457 link clicks
  - Retargeting: \$1,500 - \$3,000 (per month)
- Twitter
  - Desktop + mobile: \$500 - \$750 (per month)
- Fees - \$3,500
  - Campaign development: 2-3 hours per library location
    - This would include time for strategizing, associated creative work, and campaign setup.
  - Reporting: 2-4 hours per library location



## EMAIL MARKETING RECOMMENDATIONS

Create an email campaign template and a series of 12 emails total, or each featured electronic resource that cross sells to current library database, tracks open rates, clicks and conversions. Track existing list availability through Sierra ILS that has been collected. Communicate how librarians are available to provide a 'how-to' lesson on use of these services.

Email best practices include:

- **Cadence** - Script emails in three waves for each category – one as an introductory email with Call-to-Action (CTA) to landing page, then a week and half later the second email as a follow-up with CTA to landing page. Then two weeks later, follow up with one additional email promoting sign-up and CTA leading to landing page.
- **Frequency** - Frequency determines A) the amount of news/updates you feel your audience should or would like to know about and B) general capacity in terms of content creation, etc.
- **Template** - A similar template should be used changing only colors, fonts, logos, etc. when necessary based on the look and feel of each property. There are plenty of user-friendly email clients, however MailChimp seems to be the easiest in terms of drag-and-drop functionality, as well as list building and segmentation as well.
- **URL Tracking** - In an effort to properly track email opens and site visitors from email campaign efforts, we suggest establishing URL naming conventions using UTM parameters. These URL's will only be necessary for links that lead back to your website. Link shorteners, such as [bit.ly](https://bit.ly), can be used for links that lead elsewhere (YouTube links, etc.) as those services provide insights on their URL's as well.
- **Content** - Make the content as catered to the user as much as possible. Things like a personalized email greeting, a clear option to opt-out, keeping main messaging and CTA "above the fold", and compelling and concise subject lines. On that same note, A/B



test different subject lines and CTA's. Similar to the organic social approach, play with different days and times for email sends.

## WEBSITE RECOMMENDATIONS

Recommend updates to emphasize these three resources more impactfully.

- In concert with the campaign resources, ensure all relevant materials and information is available and visible on mcfls.org.
- Dedicate a specific informational page with links to login to the relevant portals; page would be divided into Job Hunting information and resources; Education/Tutoring information and resources; and Foreign Language Learning information and resources.
- Add the link to this page to the top menu navigation and in the informational blocks on the homepage.
- Determine where we are driving clicks for this campaign – just the MCFLS landing page and then we can drive traffic to libraries or other resources from there.
- This page would be the landing page designated in each of the proposed social/email campaigns.
- Given each of the member libraries have their own dedicated websites, provide all copy and assets developed for this page and the campaigns so they can add to their own template should they so wish. Also provide each with instructions to link to the mcfls.org dedicated pag

## PAID DIGITAL ADVERTISING RECOMMENDATIONS

Digital advertising can effectively build awareness and drive website traffic in both a mobile and desktop computer environment. Importantly, the campaigns to build awareness are



somewhat different than those that drive traffic (clicks) and conversions. Display ads are banners that are inserted into the content you are viewing as you browse the Internet. Native ads appear to be published by another source, like a newspaper or website. They are essentially paid PR placements with links.

Goals of this campaign would be:

1. Viewable targeted impressions (native and display ads)
2. Increase interest and engagement surrounding MCFLS's featured services
3. Retarget users based on site visits and ad engagement
4. Drive site traffic and library use among targeted audiences.

Target Audience Focus:

Demographic: Target the audiences previously identified in this plan.

Geographic: Set geotargeting parameters around library branches. TBD but could be ½ mile radius?

Behavioral targeting: Audiences will be targeted based on their previous behaviors such as searching for jobs online. For instance: Job seekers.

Contextual targeting: Audiences will be targeted based on the type of content they are consuming in real time. For instance, people looking at language education content. For instance: Parents of teenagers. Those seeking tutoring.

Lookalike targeting: Audiences will be targeted based on whether they fit the same criteria as an existing email list. (pulling names from your membership directory and matching those characteristics )

Retargeting: Audiences that have clicked on an ad or visited the website.

Bidding: We recommend that you budget for an \$8 CPM bid on native and a \$5 CPM bid on display, with a CTR or CPC goal. "CPM" = Cost per thousand impressions.

Format: Ad will be produced to 4 commonly used size formats.





**Customization:** All ads should be customized to the identity and URL of the member library to drive traffic to the correct locations (TBD).

**Creative / Production:** Creative is essential to engagement. We'd recommend the agency help you create a range of ads for each audience. Fee budget approximately \$6,000 for the initial campaign.

**Tracking Reporting:** All ads should be pixelated for click-tracking. As with paid social, all campaigns should be closely monitored and optimized based on performance and KPI / conversion goals. We recommend that Google Analytics is evaluated periodically (monthly) for each library to determine the actions taken.

A budget of \$15,000 for hard media will produce roughly 6.5 million targeted ad impressions. This could be run in one month or spread out over a longer period of time. Agency cost for set up and management will be roughly \$5,000 for the initial campaign. Time costs in subsequent months will be reduced after the initial campaign set up.

## **TRANSIT ADVERTISING RECOMMENDATIONS**

Transit advertising is a natural choice for MCFLS. Routes and bus stops overlay closely with library locations. It is an affordable and highly visible medium and it is very effective in reaching the target audiences.

Sample pricing for one-month programs are as follows. This does not include any fees for management or creative development.



We suggest reaching out to MCTS to discuss a cooperative partnership as their marketing objectives are similar to those of MCFLS.

**Option 1:**

25 Bus Kings (30"h x 144"w) - one per bus, street and curb side (39 weekly GRP)  
4 week Media Cost: \$5,000 net (\$200 per King)  
Impressions: 700,000 weekly  
Production Cost: \$2,750 (25 bus kings, printed/installed)

**Option 2:**

35 Bus Kings (30"h x 144"w) - one per bus, street and curb side (55 weekly GRP)  
4 week Media Cost: \$7,000 net (\$200 per King)  
Impressions: 900,000 weekly  
Production Cost: \$3,850 (35 bus kings, printed/installed)

**Option 3:**

45 Bus Kings (30"h x 144"w) - one per bus, street and curb side (70 weekly GRP)  
4 week Media Cost: \$9,000 net (\$200 per King)  
Impressions: 1,260,000 weekly  
Production Cost: \$4,950 (45 bus kings, printed/installed)



## OUTREACH/PARTNERSHIP RECOMMENDATIONS

Create an outreach/community partnership strategy that builds on the PR and social strategy for further campaign extension.

- During the year, explore potential partnerships with other local organizations who can help spread the word to your target audience.



- YMCA Southeastern Wisconsin – team up with Job Center to host the same tutorial session for their members/users of their job center <https://www.ywcasew.org/what-we-do/economic-empowerment/job-centers/>
- Partner with Milwaukee County Transit System as the vehicle to promote this campaign/resources. Because they are focused on building equity in the community, we think they may be interested. In addition to some paid advertising (outlined in that section), we see the opportunity for other awareness including:
  - Incorporate the theme line or short, clever copy onto the rotating display on front of bus to help raise awareness of the new services.
  - Co-brand a few of the bus shelters near local libraries with messaging that promotes both orgs, something like: A new pathway to success is just around the block. We'll help you get there. OR Next Stop: Success/A New Job/Better Grades. We'll help you get there.

## METRICS/REPORTING PROCESS

- Campaigns will encourage clicking through to the designated landing page; tracking of source and usage will be monitored through both Google Analytics and each of the platforms utilized (social, email)
- Initial goals for the campaigns will be to increase awareness of and traffic to the site; thereafter the goal will be to increase sign-up to and use of each service. Baseline use data will need to be established before deciding on success metrics but will likely consider site traffic (paid/organic), page traffic (paid/organic), service sign-up, service usage week on week. Organic traffic will hopefully increase both naturally and as a result of non-digital campaign efforts. The expectation is that each service will have its own specific goals due to demographics, size of audience, etc.

## CAMPAIGN TIMELINE

We are basing the following timeline on a campaign kick-off in summer 2021 or Fall 2021, based on when MCFLS hires a communication staff member to help execute the plan. We've included the primary activities here including:



- Finalize marketing plan in early to mid-February
- Determine campaign kick-off timing –tentatively Back-to-School 2021
- Develop theme line and brand logo system – April
- Develop campaign materials – April
- Reach out to Mayor’s office about designation for the day – 4-6 weeks prior to launch
- MCFLS team organizes free one-hour tutorials for all three resources to launch – month of launch – planning in June/July
- Social Campaign – plan 4 weeks prior to campaign
- Digital advertising – plan 4-6 weeks prior to campaign

Task	Time	Cost	Completion
Logo/Brand System Development/Theme Line Development	February	\$6,500.00	3 weeks from start
Ad Creative/Production	6-8 weeks prior to launch	\$6,000.00	3 weeks from start
Paid Digital Media Management	4 weeks prior to launch	\$5,000.00	4-week campaign
Paid Social Media Management	4 weeks prior to launch	\$3,500.00	4-week campaign
Digital Ads Out-of-Pocket Budget	4-6 weeks prior to launch	\$15,000.00	4-week campaign
Transit Advertising	TBD	\$2,750-\$4,950	TBD



## BUDGET SUMMARY: SECTION V

The following are specific tasks we recommend you use an agency and related fee and out-of-pocket costs

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STIR Authorization

Date

---

Client Authorization

Date

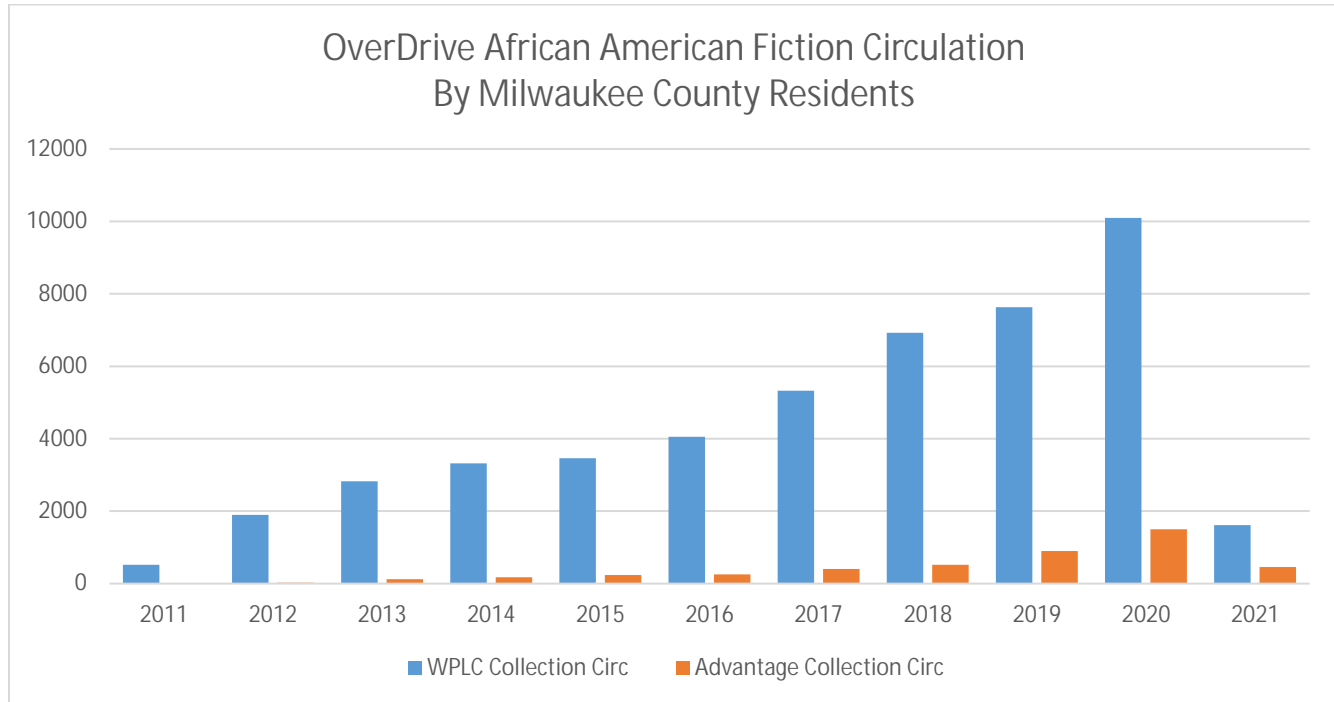


## OverDrive EDI Title Data Collection

### African American Fiction

Total Titles: 1,169

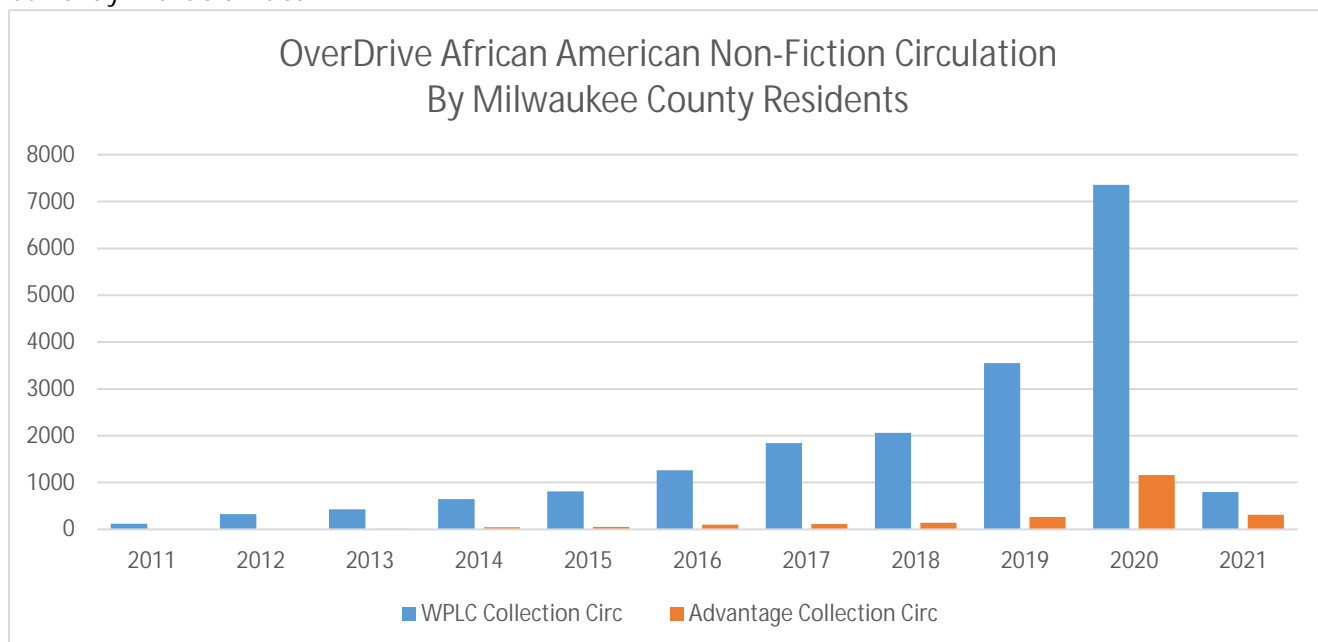
Currently Available Titles: 800



### African American Nonfiction

Total Titles: 189

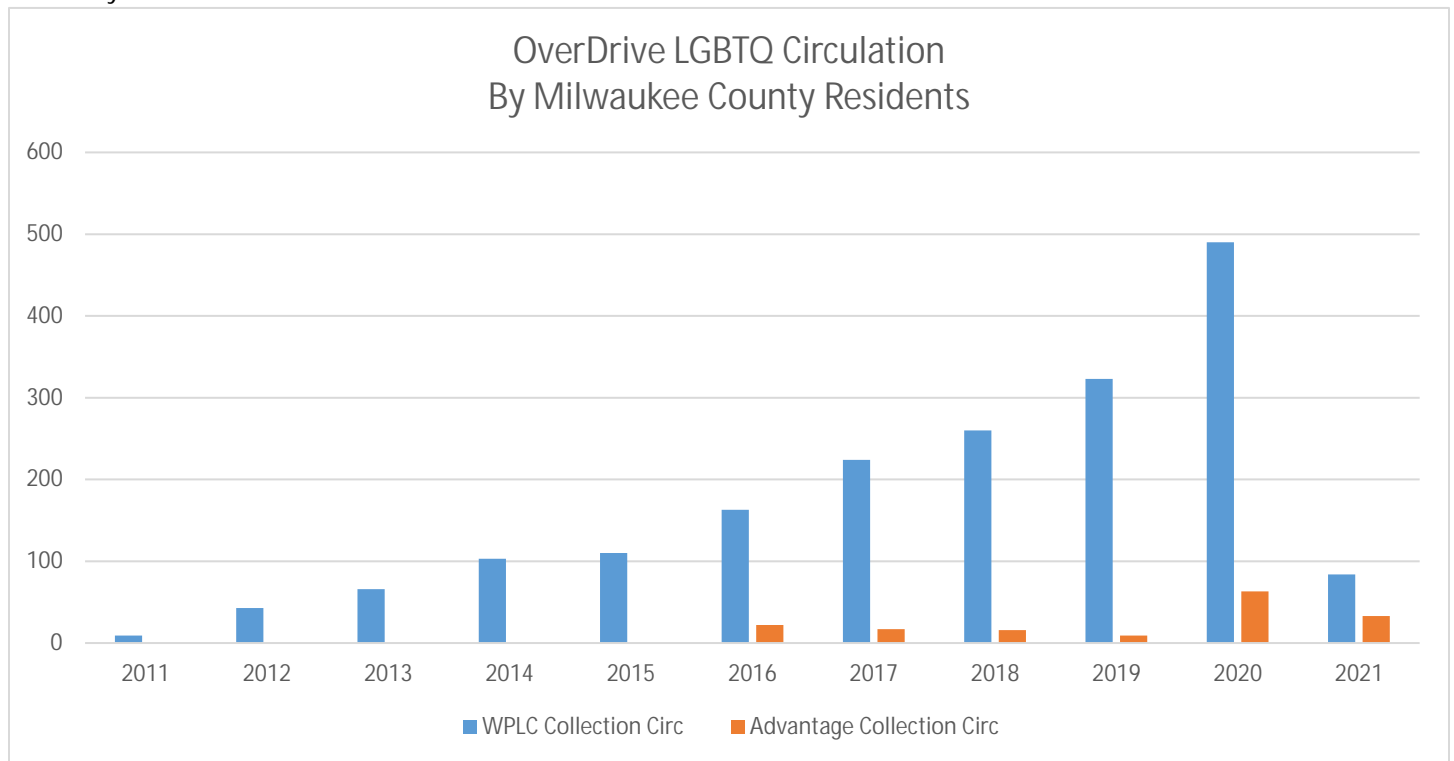
Currently Available Titles: 72



## LGBTQ

Total Titles: 114

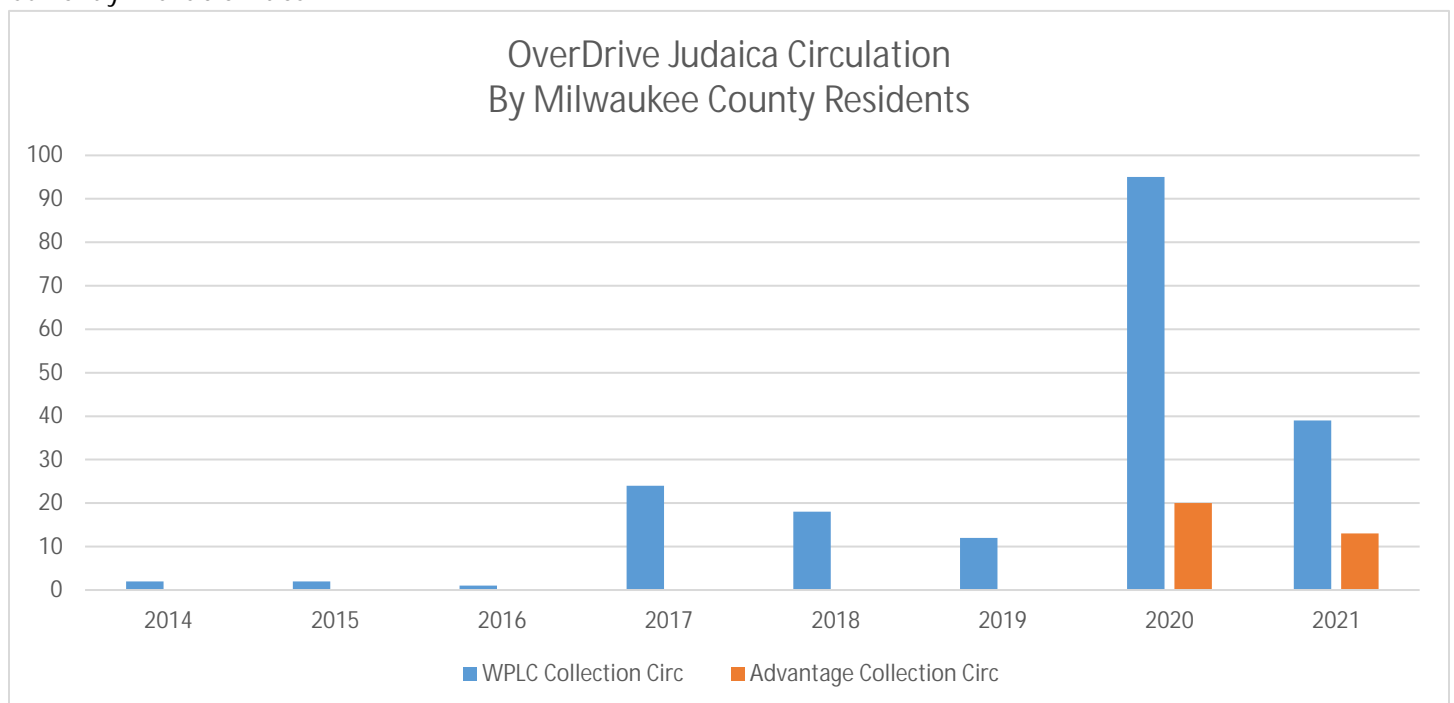
Currently Available Titles: 54



## Judaica

Total Titles: 13

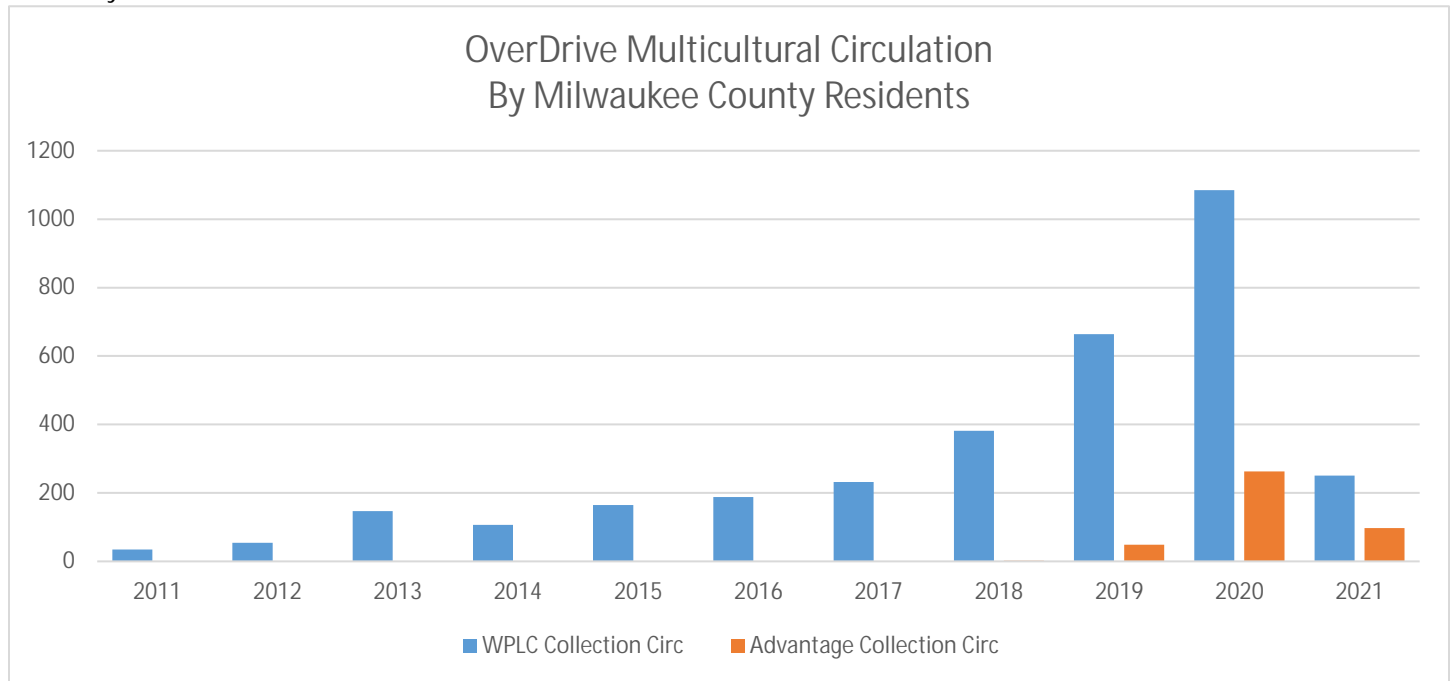
Currently Available Titles: 7



## Multicultural

Total Titles: 194

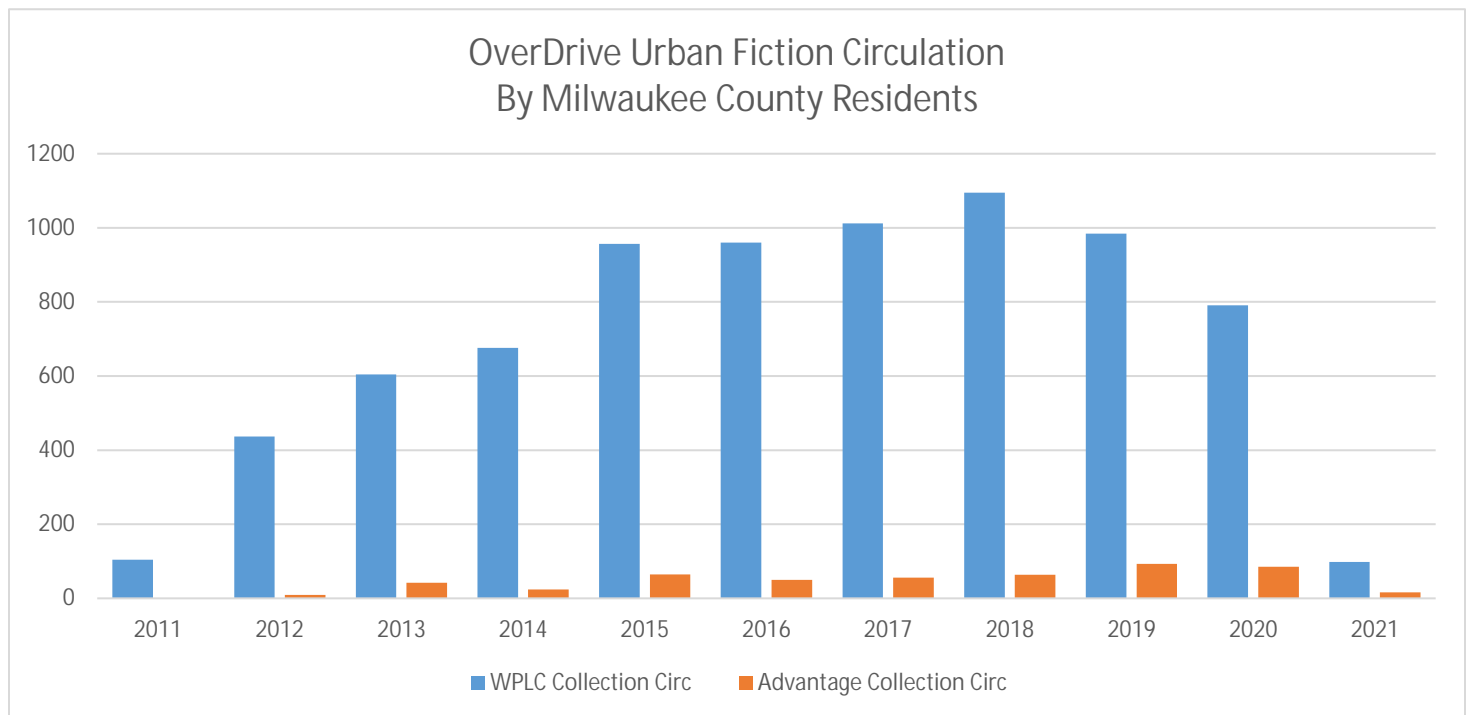
Currently Available Titles: 105



## Urban Fiction

Total Titles: 121

Available: 105





## OverDrive Advantage Options for Spending County Funding

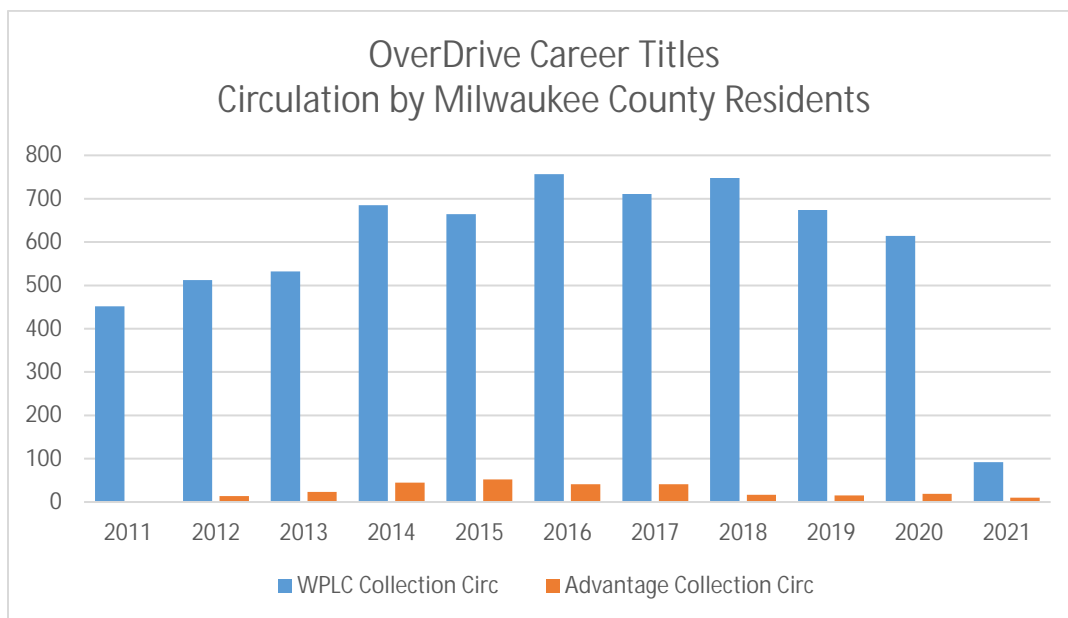
Some possible options for using the additional \$50,000 in county funding:

Option 1. Use all county funding towards addressing holds on high demand titles.

Option 2. Split the funding between high demand titles and EDI titles that show high demand by Milwaukee County residents

- 50% to high demand titles
- 50% to EDI titles
  - African American Nonfiction
  - LGBTQ
  - Multicultural
  - Urban Fiction

Option 3. Use option 2 but put aside additional funding for career resources



# BALANCING THE BOOKS

*The financial challenges facing the  
Milwaukee Public Library*



WISCONSIN  
**POLICY FORUM**

## ABOUT THE WISCONSIN POLICY FORUM

The Wisconsin Policy Forum was created on January 1, 2018, by the merger of the Milwaukee-based Public Policy Forum and the Madison-based Wisconsin Taxpayers Alliance. Throughout their lengthy histories, both organizations engaged in nonpartisan, independent research and civic education on fiscal and policy issues affecting state and local governments and school districts in Wisconsin. The Wisconsin Policy Forum is committed to those same activities and to that spirit of nonpartisanship.

## PREFACE AND ACKNOWLEDGMENTS

The planning process that culminated in this report was undertaken to assist the Milwaukee Public Library and its Board of Trustees in identifying strategies to address growing financial challenges that may threaten their ability to sustain existing service levels. Report authors would like to thank the many individuals and organizations that participated in that process and provided us with their valuable input.

We would also like to thank the Milwaukee Public Library and the City of Milwaukee for providing the financial support that helped make this report possible.



# BALANCING THE BOOKS

*The financial challenges facing the  
Milwaukee Public Library*

December 2020

Study authors:

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Joe Peterangelo, Senior Researcher  
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## EXECUTIVE SUMMARY

The Milwaukee Public Library (MPL) is at a crossroads. At a time when the demand for library services is likely to grow as a result of partially shuttered schools and increased numbers of unemployed residents seeking to use library resources, MPL faces the prospect of future funding reductions from the city of Milwaukee in light of the city's own fiscal challenges.

In response, MPL's Board of Trustees created a "Financial Sustainability Task Force" to consider possible solutions. The Task Force's key findings and recommendations include the following:

- **City support has been flat.** City funding supports the bulk of MPL's total operating budget, but that funding grew by only \$686,000 (3.1%) from 2011-2019, which equates to a \$2.5 million decrease (-10%) when adjusted for inflation. In light of the need to accommodate inflationary increases in salaries and other items, MPL was forced to cut staff and reduce services during that period. The city's worsening financial prognosis makes even the prospect of flat funding somewhat dubious going forward.
- **Changes to MPL's governance and structure should be considered but are impractical for now.** Task Force members agreed that comprehensive structural changes should be considered to ensure financial sustainability for MPL, including possible creation of an independent library district with taxing authority or a countywide cultural district that would support MPL and local cultural institutions. However, they agreed that because those and other structural solutions involving new funding would require state approval, they are unlikely to be approved in the near future and should be shelved for now in light of the immediacy of MPL's challenges.
- **New partnerships and earned revenue possibilities should be pursued but would not provide meaningful long-term relief.** The Task Force also focused on actions MPL could take independently or in partnership with other local entities. Those included enhanced partnerships with Milwaukee Public Schools, other Milwaukee County libraries, or local nonprofit youth development organizations; and options to grow earned revenues like using MPL facilities to host galas and weddings. However, while these ideas were deemed to hold some promise, the Task Force agreed they would not be lucrative enough to meaningfully change MPL's fiscal paradigm.
- **Carving out a larger role for the MPL Foundation was seen as the most effective short-term approach.** The Task Force ultimately recommended that the MPL Foundation be approached to consider modifying its previous manner of support, either by increasing annual contributions or allowing its funding to support ongoing operations. Currently, Foundation monies only support extra programming or services made possible by its contributions. Task Force members acknowledged that such a request should be accompanied by a possible maintenance-of-effort financial commitment from the city and a greater say for the Foundation in MPL operations.

The recommendation to seek a re-defined public-private partnership between MPL and its foundation was justified, in part, by the argument that the "add-on" programming traditionally supported by the Foundation would be diluted if MPL is forced to close branches or reduce hours. However, Task Force members underscored that such an enhanced partnership should be viewed not as a comprehensive solution, but as a "life preserver" that would buy some time before significant service reductions again may need to be contemplated.

# INTRODUCTION

Despite vast technological changes in recent years that have transformed the manner in which citizens seek and digest information, the Milwaukee Public Library (MPL) has continued to play a critical role in providing citizens with free access to knowledge, enhancing school readiness for Milwaukee children, and promoting literacy for both children and adults. In fact, according to MPL, its libraries received more than 1.8 million visitors in 2018; circulated more than 1.4 million books, electronic books, and audio books; and served more than 25,000 youth in its summer reading program.

Yet, notwithstanding the importance of Milwaukee's public libraries in the city's social and education landscape, and even before the COVID-19 pandemic, the library system faced a set of daunting challenges. As a result of the city's overall fierce budget difficulties, library staffing and hours have been reduced in recent years, with the prospect for more substantial reductions looming even before the pandemic further damaged the city's finances. Meanwhile, MPL's ability to invest in technology and workforce to keep pace with the changes in information access and consumption has been sharply limited by its fiscal constraints.

The Wisconsin Policy Forum (WPF) was commissioned by the MPL Board of Trustees to facilitate a series of planning sessions by a Board-appointed "Financial Sustainability Task Force" that was created to grapple with these growing challenges. Specifically, the Task Force's objective was to produce recommendations for strategies MPL might employ to secure the financial resources it requires and/or possible changes to operations that would allow it to achieve its mission in the future.

The Task Force met on five separate occasions between late January and September 2020. Two in-person meetings were held prior to the pandemic with the remaining three held virtually. A list of Task Force members can be found in **Appendix I**.

Task Force deliberations initially focused on long-term structural changes to MPL financing and governance that could not be pursued by the city independently, but instead would require action or approval by another level of government. Those discussions were informed by Forum research on financial and structural models from other parts of the country.

Ultimately, the Task Force decided that while such longer-term, comprehensive changes may be desirable, the immediacy of MPL's challenges demanded consideration of a series of shorter-term responses that might be effectuated by MPL and the city on their own. The last three meetings focused primarily on consideration and review of such potential solutions.

This report summarizes the deliberations of MPL's Financial Sustainability Task Force and lays out the strategies and next steps it is recommending to address MPL's financial future. We hope it lays the groundwork for a series of actions to shore up the Library's financial condition and ensure that it remains a fully accessible and viable resource for the hundreds of thousands of Milwaukee residents who use it and rely upon it.

## BACKGROUND

Milwaukee Public Library is the largest public library in Wisconsin, with its 12 branches and various education, outreach, and express library services serving a population of nearly 600,000 city residents. It is one of 15 libraries in the Milwaukee County Federated Library System (MCFLS), which also includes the suburban communities within Milwaukee County.

A February 2020 Wisconsin Policy Forum report on the state's libraries, [By the Book](#), noted that "traditional" library usage metrics – such as visits and circulation – have declined at MPL and throughout Wisconsin since peaking during the economic recession of the late 2000s. However, new metrics such as e-content usage, use of WiFi, and program attendance have shown steady increases, indicating that library usage is evolving and not necessarily in decline. The report also found that people of color and those with lower incomes have particular reliance on libraries.

### Value of Public Libraries

One way to measure the value of MPL to the greater Milwaukee community is to consider its economic impacts. A body of national research attempts to analyze the costs and benefits of libraries. For example, the Institute of Museum and Library Services conducted a [study](#) for the Minnesota Department of Education in 2011 that found Minnesota's public libraries provided a return on investment (ROI) of about \$4.62 for every dollar invested by state and local governments. Major benefits cited by this study included economic value from library programs, public computers, and general circulation. It also pointed to several other national studies that found ROIs of public libraries ranging from \$2.38 to \$6.54, with a median of \$4.14.

Another [study](#), conducted by NorthStar Economics, Inc. in 2008, looked specifically at the state of Wisconsin. While public libraries directly employed over 3,000 individuals in the state, the study found another 3,000+ jobs were created indirectly by libraries, mainly through capital projects. Ultimately, researchers noted that the economic contribution of libraries in Wisconsin totaled more than \$725 million, for an ROI of \$4.06.<sup>1</sup>

Public input is another important way to measure the value of public libraries. The Marquette Law School Poll asked state residents a slate of questions in both 2015 and 2017 that shed light on how Wisconsinites use and value their libraries. In the 2017 poll, 58% of survey respondents said they had been to a public library in the previous year. Data from both surveys revealed that low-income individuals and people of color were more likely to use library services, suggesting that the library can play an important role in creating a more equitable educational environment in the state.

Previous Wisconsin Policy Forum [research](#) found that library usage in Wisconsin peaked during the Great Recession, and national literature reinforces the idea that libraries play an important role during economic downturns. With a staggering economic picture created by the COVID-19 pandemic, this may suggest that Wisconsin's public libraries – including MPL – will be of particular value to the state in the coming years, even though many of their doors were forced to temporarily close in recent months.

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<sup>1</sup> According to MPL, the Institute of Museum and Library Services recently commissioned a new study on the impact of libraries and museums on the well-being of communities. MPL was selected as one of 12 public libraries to be included in the study, which will be released early in 2021.



## MPL FINANCES

As MPL looks to the future, it faces the likelihood of budget allocations that fail to meet its cost to continue as the city of Milwaukee struggles to meet its many fiscal challenges under a heavily restrained revenue structure that is largely defined by the state of Wisconsin. Growing public safety costs (which currently consume over 50% of the general budget), a growing backlog of capital projects, and diminished reserves are additional key challenges. However, overshadowing all of them is a projected increase in the annual employer pension contribution in 2023 that could approach \$80 million and that is already requiring sizable additional annual contributions to the city's pension reserve.<sup>2</sup>

### Revenues and Expenditures

MPL's 2019 budget included just under \$23 million for operations from an appropriation by the city of Milwaukee and an additional \$2.2 million in city appropriations for capital projects. Expenditures and revenues that do not involve city resources – such as those associated with MPL Foundation contributions and grants – are not included in these totals. As shown in **Chart 1**, the \$23 million city appropriation was MPL's largest source of revenue and comprised 70% of its total operating revenues. MPL comprised 4% of the city of Milwaukee budget in 2019.

Contributions from the independent MPL Foundation were another notable item, representing 6% of total

### Modernizing MPL's Branch Libraries

Readers of this report may wonder how MPL has been able to open new branch libraries in recent years despite its severe financial challenges. Over the last decade, MPL has replaced four of its 12 branch libraries as part of new mixed-use developments while also renovating a fifth.

The answer is that these projects have been supported through the city's capital budget, which is distinct from its operating budget and relies mostly on funding from bonding rather than property taxes and fees. The city has been able to fit these projects into its overall capital improvements plan, which has made them possible despite MPL's operating budget woes.

MPL's redevelopment strategy aims to exchange buildings slated for replacement with modern, technologically advanced facilities that better meet community needs while adding value to the city's tax base (by including apartments as part of mixed-use developments) and reducing the library's construction and operating costs.

The five new or renovated branches include larger community rooms along with more flexible space, new technology, and other modern features. They were less costly to build than new, stand-alone libraries and are energy efficient and designed to be able to function with reduced staff, which makes them less costly to operate.

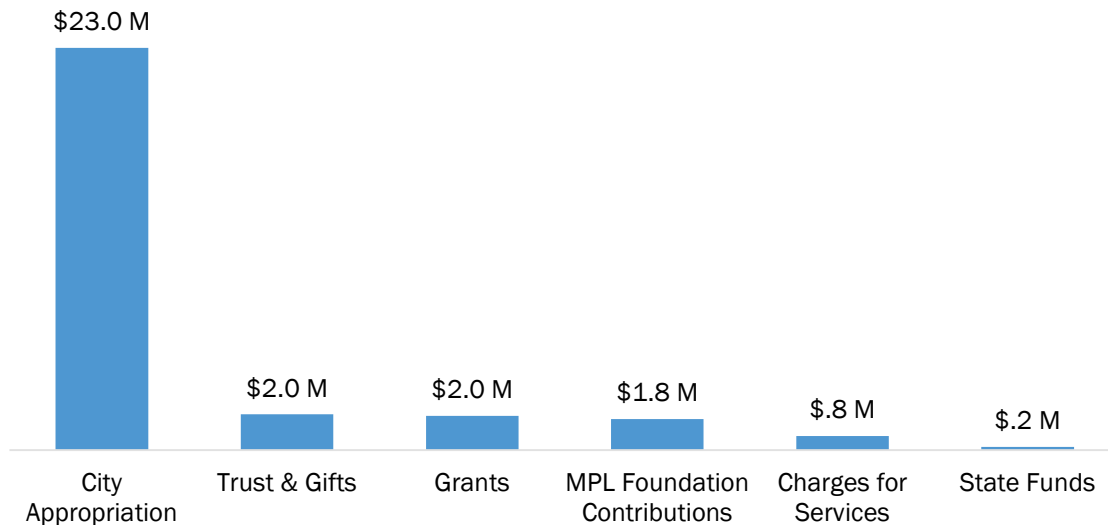
Following positive responses to the new Villard Square and East branches, MPL and the city developed a plan in 2014 to replace the outdated Forest Home, Mill Road, Capitol Drive, and Martin Luther King branches in a similar manner and to renovate Tippecanoe. The city committed \$22.5 million to those projects in capital budgets. Plans to redevelop the Martin Luther King and Capitol branches have been delayed, but MPL plans to begin work on a new King branch in 2020 or 2021 and Capitol branch as soon as possible.

If MPL's fiscal challenges require it to eliminate one or more branch libraries in the future, these five branches likely would not be considered because the city so recently invested in them and they are the newest, most modern library facilities in Milwaukee.

<sup>2</sup> A more detailed description of the city's fiscal challenges can be found in our [2021 City of Milwaukee Budget Brief](#).

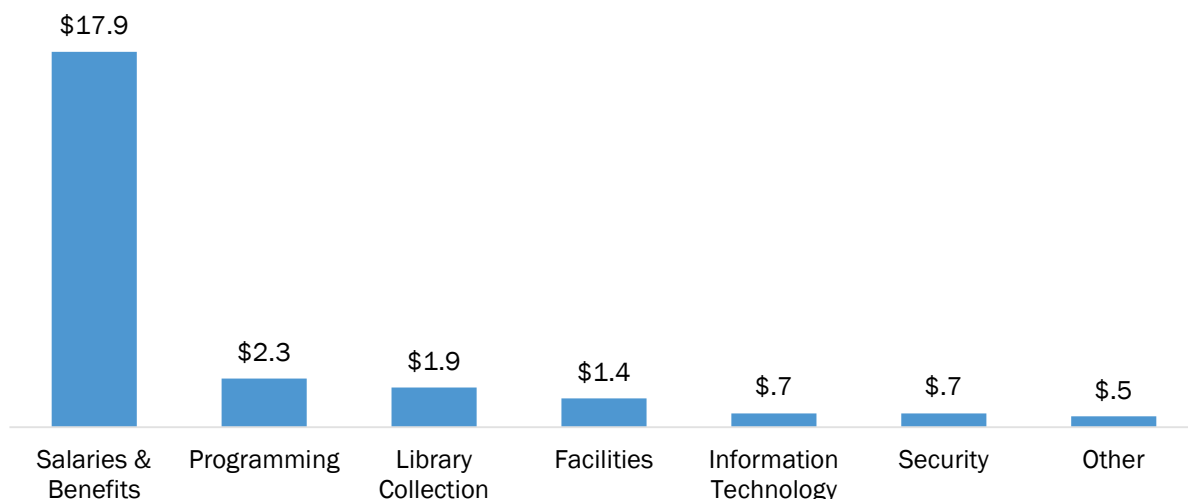
operating revenues. Those contributions may only be used to supplement existing programming and not for MPL's general operations (such as staff, collections, etc.). Also, the \$2.0 million for Trust & Gifts includes a non-recurring \$1.3 million gift and is not a typical amount; and the Charges for Services are generated by MPL but are transferred to the city's general fund.

**Chart 1: 2019 MPL operating revenues (in millions)**<sup>3</sup>



Total MPL operating expenditures in 2019 were \$25.3 million, which drew from all revenue sources shown in **Chart 1**. As shown in **Chart 2**, salaries and benefits were 71% (\$17.9 million) of the total, followed by programming at \$2.3 million (9%) and spending on maintaining the library's collection of books and other materials at \$1.9 million (7%).

**Chart 2: 2019 MPL operating expenditures (in millions)**



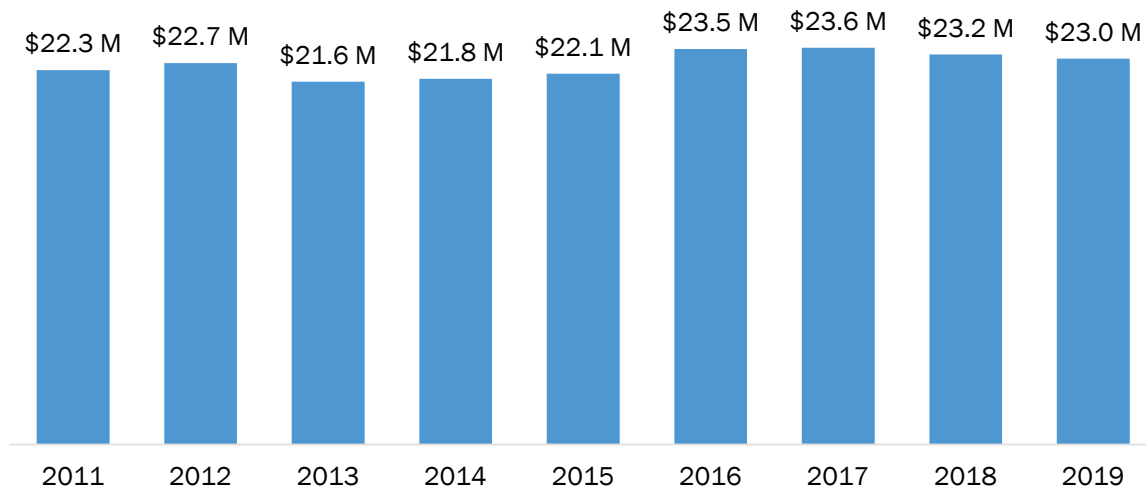
<sup>3</sup> The source for this chart and all others in this report unless otherwise noted is city of Milwaukee budget documents or financial information provided directly by MPL. Also, we use 2019 as our latest year for financial analysis because that is the latest year for which complete fiscal data were available to us when this project was initiated.

That same year saw \$2.2 million appropriated for capital improvements, including \$1.4 million in support of new facilities for the Capitol and Martin Luther King branches. Capital projects are financed separately from operating costs – largely through general obligation debt financing – and are therefore not considered in our analysis of MPL’s long-term structural challenges.

## Budget Trends and Future Projections

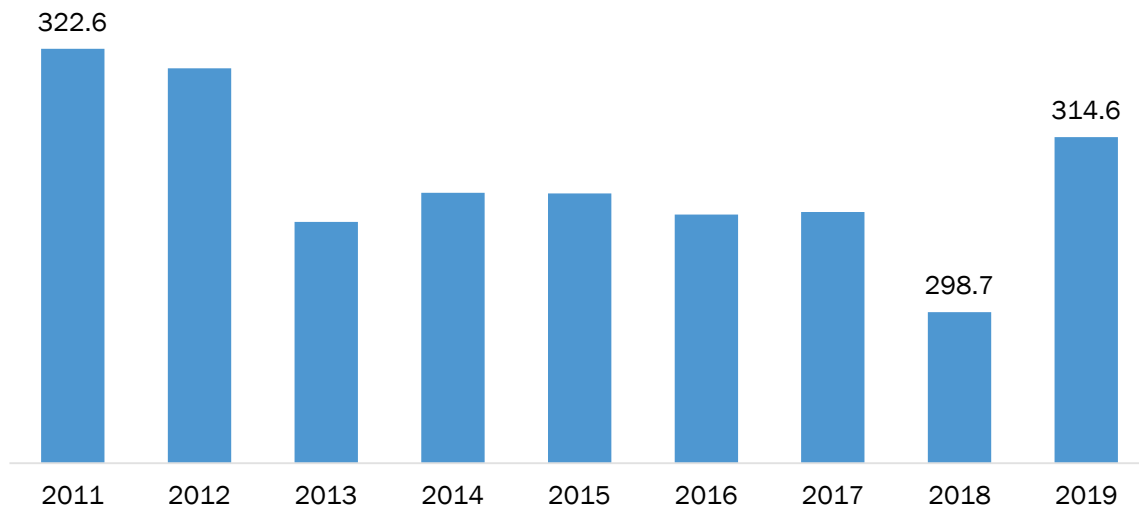
The city portion of MPL’s total operating budget has been largely flat over the past decade, as shown in **Chart 3**. Over the 2011-2019 timespan, city appropriations for MPL budget grew by only \$686,000 (3.1%), which equates to a \$2.5 million decrease (-10%) when adjusted for inflation. MPL officials also provided data going back to 2000 that show a similar trend for the previous decade; MPL’s budget decreased by about \$540,000 from 2000 to 2010, which equates to a \$4.8 million decrease (-23%) when accounting for inflation.

**Chart 3: MPL operating budget funded via city appropriations, 2011-2019 (in millions)**



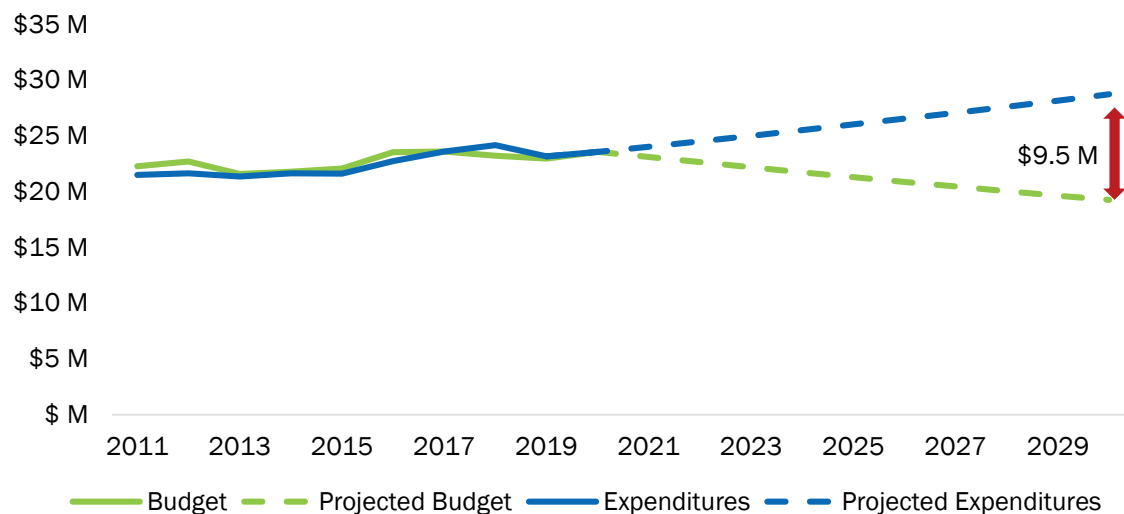
In light of the need to accommodate inflationary increases in salaries and other items, the flat operating budget appropriation required MPL to consider adjustments in its workforce, which led to service reductions including fewer open hours. In 2011, MPL had 322.6 full-time equivalent (FTE) employees, which dropped to a low of 298.7 in 2018 before rising to 314.6 in 2019 (**Chart 4**). Library hours did not suffer over the full period, however, showing an overall upward trend from 2011-2019, though some years saw a decrease.

**Chart 4: MPL FTEs, 2011-2019**



While the city at least maintained level appropriations for MPL over this period, that may not be possible in the future given the city's skyrocketing pension obligation and overall fiscal challenges.<sup>4</sup> To contextualize the impacts of possible annual reductions in city funding without replacement by other revenue streams, **Chart 5** shows a hypothetical scenario in which MPL's city appropriation declines by 2% annually while its cost-to-continue expenditure needs increase by 2% annually. Under such a scenario, MPL would face a \$9.5 million gap between city appropriations and cost-to-continue needs by 2030. The outcome likely would be reduced hours, branch closures, or both.

**Chart 5: Projected budget gap by 2030 (in millions)**



Finally, while it is not yet possible to determine what actions MPL might need to take to respond to future reductions in city appropriations, a glance into the way it has previously reacted to annual

<sup>4</sup> Research for this report was completed prior to deliberations on the city's 2021 budget, which was adopted in November 2020. The 2021 budget does not include a reduction in MPL appropriations when compared to the 2020 budget, but the city appropriation falls short of the amount requested by MPL to meet its "cost to continue." If the annual 2% reductions in MPL's appropriation shown in **Chart 5** were instead to begin in 2022, the gap by 2029 would still be sizable at \$8.5 million.

budget appropriations that have failed to meet its ongoing costs may give some indication. While MPL leaders have averted branch closures, they have been forced to implement reductions in library hours and services several times during the past decade (although, as noted above, in healthy budget years some hours and services have been restored). **Table 1** summarizes the most significant annual service reductions that have occurred since 2009.

**Table 1: Milwaukee Public Library service reductions, 2009-2019**

Year	Budget Allocation	% Budget Reduction	Major Service Changes
2009	21,811,023	-2.87%	Wednesday evening hours cut at Central Library and media room circulation desk closed
2010	20,133,502	-7.69%	Cuts in Thursday evening hours at branches and daily subject room hours at Central Library
2013	21,593,610	-4.87%	Monday morning reference services eliminated at branches and Monday morning hours cut at Central Library
2018	23,206,425	-1.67%	Temporary service reductions at Mill Road branch
2019	22,951,785	-1.10%	Planning begins for reduced number of service points at Central Library for 2020 and 2021

Source: MPL

## Peer Cities

While it is impossible (or would be very subjective) to determine an “appropriate” amount of library spending in Milwaukee, **Table 21** shows eight peer city libraries throughout the U.S. that serve populations that are similar demographically to Milwaukee. Our purpose is to provide context regarding the size of their annual budgets and where and how they derive their public funding. The average annual operating budget for the eight peer cities was \$29.8 million, or about \$4.5 million more than MPL’s operating budget that year.

**Table 2: Milwaukee and peer cities**

City	2019 Population Estimates	Median Household Income, 2014-2018	Library Operating Budget	Primary Funding Source for Library
Milwaukee, WI	590,157	\$40,036	\$25.3 million	Municipal appropriation
Kansas City, MO	495,327	\$52,405	<a href="#">\$22.6 million</a>	Municipal appropriation
Charlotte, NC	885,708	\$60,886	<a href="#">\$41.6 million</a>	County appropriation
Raleigh, NC	474,069	\$63,891	<a href="#">\$28.4 million*</a>	County appropriation
Omaha, NE	478,192	\$56,780	<a href="#">\$16.0 million</a>	Municipal appropriation
Cleveland, OH	381,009	\$29,008	<a href="#">\$72.3 million*</a>	Public Library Fund & dedicated property tax
Columbus, OH	898,553	\$51,612	<a href="#">\$69.0 million</a>	Public Library Fund & dedicated property tax
Oklahoma City, OK	655,057	\$54,034	<a href="#">\$37.0 million</a>	Dedicated property tax
Memphis, TN	651,073	\$39,108	<a href="#">\$22.0 million</a>	Municipal appropriation

Source: U.S. Census Bureau (Population and Income), budget reports from individual libraries (Spending and Funding Source)

\*Includes both operating and capital expenditures

Like MPL, many of the peer city libraries shown in the table rely on appropriations from the local governments that administer them (either a municipality or county) for most of their revenue. However, the Oklahoma City Public Library is granted the ability to levy its own dedicated property tax, and the state of Ohio utilizes a segregated “Public Library Fund” to provide a consistent revenue stream to libraries throughout that state, which complements municipal revenue.

Because peer library spending provides only limited context with which to assess MPL’s annual operating budget, we also calculated what MPL’s 2019 budget amount would have been had it simply grown at the rate of inflation since 2000. Had such growth occurred, then the 2019 operating budget would have totaled \$31.1 million, or \$5.8 million more than the actual budgeted amount.

## POTENTIAL PATHS FORWARD

The Task Force's deliberations began in January 2020 before the onset of the COVID-19 pandemic, which exacerbated the city's financial challenges and created even greater urgency for MPL to plan for a fiscal future that may need to involve less reliance on city appropriations. In light of the uncertainty surrounding the city of Milwaukee's finances and the broader impacts of COVID-19 on MPL, the Task Force considered a variety of possible solutions, which can be broken down into two categories.

The first category is "Long-Term Solutions" that ultimately would require action by other levels of government besides the city of Milwaukee or by private entities. Most would involve a fundamental change in MPL's financing or governance. The second category involves decisions that MPL or city government could make on their own and begin to implement relatively quickly. These "Short-Term Solutions" include smaller structural shifts to MPL's business model, collaborations with community partners, and earned revenue opportunities.

### Long-Term Solutions

#### *Public-Private Model*

In recent decades, as concerns over public sector finances and service capacity have grown, many local governments have contracted out certain services to private entities. According to a 2007 [survey](#) by the International City/County Management Association (ICMA), private for-profit organizations delivered many popular services at the local level, including vehicle towing and storage (65.4% of governments surveyed), commercial solid waste collection (56.2%), legal services (51.9%), and electric utility operating and management (47.8%). Out of 67 functions surveyed, however, libraries ranked fourth-lowest (1.4%) in the share of governments contracting services out to private for-profit organizations, ahead of only crime prevention/patrol (0.5%), fire prevention/suppression (0.8%), and police/fire communications (1.1%).

The concept of a public library operated by a private, for-profit organization is relatively new. According to a 2012 American Library Association (ALA) [publication](#), "the trend of privatizing public libraries started in 1997, when California's Riverside County Library System contracted with LSSI [Library Systems & Services, LLC]." The book notes that LSSI – now known as LS&S – was at the time the only organization to provide private, for-profit management services for public libraries. We are not aware of another organization that does so today.

Currently, MPL operations – and the operations of all Wisconsin libraries to our knowledge – remain squarely in the public sector. In the public-private model, MPL would continue to function as a department of city government, but instead of using city staff for library operations, it would contract with an organization like LS&S to manage and staff its library branches.

Potential strengths of this strategy include possible cost savings, as a private company may be able to hire and retain staff at lower pay and fringe benefit levels than the city and may be able to spend less for administrative support, like human resources and payroll. A private company like LS&S also may have greater capacity to implement new technologies that have been tested and refined at their other libraries.



The Task Force noted several concerns with this approach, however. Those include potential public opposition to the notion of a private, for-profit entity taking over management of a public library; the negative implications of paying workers less in terms of both wages and benefits; and concerns about transparency with the removal of some library decision-making removed from public view.

### *Independent Taxing Authority*

One solution to the library's reliance on an increasingly challenged city government for the bulk of its financing would be to grant it statutory authority to levy its own tax – most likely a property or sales tax – to support its operations. According to the U.S. Census Bureau, 28 states had at least one library or library system set up as a special taxing district in 2017, with most own-source revenue coming from a property tax levy. Those districts exist in numerous Midwestern states, including Illinois, Indiana, Michigan, Minnesota and Ohio.

In practice, this strategy would mean removing MPL from the umbrella of city government and reorganizing it as its own taxing district, similar to how the state organizes certain utilities, lake districts, and sanitary districts. Some states place limits on special districts by instituting a mill rate ceiling (so the levy can grow alongside property value growth), and Wisconsin could do likewise or apply its current municipal and county levy limits, which are tied to growth in net new construction.



*Libraries in Ohio, such as the Columbus Metropolitan Library, benefit from a dedicated property tax that comprises a large portion of their yearly operating revenues. Photo source: Columbus Metropolitan Library*

The obvious benefit of this approach for MPL would be the creation of a dedicated and reliable major source of funding for which it would not need to compete with other city functions. Considerable precedent also exists for this type of approach; as we noted in an August 2019 [report](#), Wisconsin has more than 700 special district governments and the number grew more than tenfold from 1967 to 2017.

The main drawback is that such an approach would require a change in state statutes, and the prospects for legislative approval would be unlikely given almost certain opposition from Republican leaders in both the Wisconsin Assembly and Senate to the notion of a new form of taxation. Also, Wisconsin's comparatively high property tax burden when compared to other states and its comparably high number of governmental units would be cause for careful scrutiny of the idea of creating another new governmental entity with its own property tax levy authority.



### ***Cultural/Special Taxing District***

Shifting taxing authority from the municipality to the library is not the only way to provide a consistent, tax-based revenue stream. Certain cities have chosen to group “cultural” entities together – including libraries – to form a “Cultural Taxing District” (CTD). For example, the Allegheny Regional Asset District (RAD) – which draws its support from a 1% Allegheny County sales tax – includes Pittsburgh’s Carnegie Public Library.

Creating a district like this for MPL and other publicly-owned cultural assets would require the removal of these entities from the city and county and state legislators would need to grant the district authorization to levy either a property or sales tax. A CTD in Milwaukee might include MPL, the Milwaukee County Zoo, the Marcus Center for the Performing Arts, the Milwaukee Public Museum, and perhaps the Milwaukee County Parks.

The benefits cited above for an independent library district also would apply to a CTD. A major difference, however, is that CTDs in other metro areas tend to use sales taxes instead of property taxes. According to a July 2020 [analysis](#) from the Tax Foundation, Wisconsin’s average combined state and local sales tax rate is 5.43% – the fourth-lowest across states that have any type of sales tax and lowest in the Midwest by more than half a percentage point. Consequently, this could make a CTD a more attractive option for MPL than the option of re-creating as its own taxing district. Expanding the district to include popular attractions like the zoo and public museum might also enhance political support. On the negative side, it should be noted that sales tax collections tend to be impacted more negatively and immediately than property taxes during economic downturns, as county governments in Wisconsin have seen over the past several weeks.

Despite differences between this approach and an independent library district, the same opposition to creation of a new governmental entity with independent taxing authority likely would emerge for a CTD. In fact, previous proposals for separate parks, transit, and cultural districts for Milwaukee County services have not gained traction in the Wisconsin Legislature. Also, even bringing such a proposal before legislative leaders would require agreement by city and county leaders on which cultural and related institutions to include in the CTD, which could be a challenging endeavor.

### ***501c(3) Nonprofit Status***

While most public libraries in the United States are governmental entities, some have chosen to re-charter as 501c(3) nonprofit status after weighing the benefits and costs of doing so. Among the potential benefits are



*The Milwaukee Public Museum is one Wisconsin cultural institution that has turned to nonprofit management, in part to enhance attractiveness to potential philanthropic donors. Photo source: Shepherd Express*

enhanced attractiveness to philanthropic donors, who might be more inclined to donate to private charities than governmental entities; and eligibility for a wider variety of grant opportunities.

If MPL wanted to become a 501c(3) organization, it would need to leave the umbrella of the municipal government in Milwaukee and re-charter. As a result, its employees would no longer work for the city but instead would be employed by the freestanding nonprofit organization. In addition, the new organization would need to hire new staff or supplement existing staff for certain services currently provided by the city for all of its departments, like legal services and some information technology services. It is possible that these changes could produce savings for MPL in areas like fringe benefits for existing employees, but it is also possible that the need to procure certain services from the private sector could be more expensive.

A potential detriment associated with this option could be the loss of city support, as city leaders may not be as inclined to maintain or increase annual appropriations if MPL no longer functioned under city ownership and as a city department.

Few large libraries – and none of the peer city libraries cited above – operate as nonprofits, although the Youngstown (OH) Public Library is an example of a smaller library in the Midwest with 501c(3) status. A more familiar related example is the Milwaukee Public Museum (MPM), which is owned by Milwaukee County but is managed and operated by a nonprofit organization (MPM, Inc.) hired by the county. A similar option also could be considered for MPL, with pros and cons similar to those cited above in this section as well as our earlier discussion of the public-private model.

### ***Summary of Task Force Discussion on Long-Term Options***

Task Force members did not support pursuit of the public-private and nonprofit status options. Several argued that MPL is efficiently and effectively administered and operated by city employees and that little if any financial benefit would likely result from a shift to the private or nonprofit sector or from MPL's re-creation as a 501c(3) nonprofit. Members also expressed a desire to keep MPL in the public sector realm.

Conversely, creation of a dedicated revenue source for MPL received widespread support, either by granting it the authority to levy a dedicated tax as an independent district or by housing it in a larger cultural district with similar authority. However, the Task Force decided not to deliberate over the details of each option nor to recommend a preferred approach given its consensus that state approval to pursue either option was highly unlikely for the foreseeable future.

Instead, the Task Force reached consensus that it should put aside any potential options involving new funding sources that would require state approval and to instead focus on possible solutions that could be pursued independently of governmental entities outside of city government. Such consensus was reached reluctantly, however, as most members agreed that a true path to financial sustainability for MPL should include dedicated funding.

## **Short-Term Solutions**

The last two meetings of the Task Force focused on possible opportunities to increase revenues through actions MPL could take on its own or in partnership with other governmental entities in the city or region or its own private nonprofit support organizations – the Milwaukee Public Library

Foundation and Friends of the Milwaukee Public Library. Options discussed by the group are summarized below:

- **Partner with Milwaukee Public Schools (MPS).** Libraries throughout the country have collaborated with contiguous school districts, with partnerships ranging from collaborative programming to joint governance. New York's "[School District Public Libraries](#)" are one example of joint governance, though in keeping with the Task Force's emphasis on short-term options, it was felt that pursuit of less comprehensive forms of collaboration would be more appropriate. One such example could be outreach by MPL to run educational or afterschool programming under a contractual arrangement with MPS.
- **Collaborate with other libraries in the county.** The city of Milwaukee and the suburban municipalities within Milwaukee County could consider consolidating into one library system, though such action would require involvement and approval by several distinct local government bodies (as well as the state) and would escalate to the level of a long-term solution. Instead, Task Force members discussed possibilities for greater partnership between MPL and suburban libraries in Milwaukee County (who already function as part of the Milwaukee County Federated Library System), including possibilities for joint programming or sharing of specialized staff.
- **Enhance earned revenues.** Several Task Force members noted that libraries around the country earn additional revenues by using their facilities to host events, such as galas and weddings. This could be an opportunity to earn revenue during hours in which MPL facilities typically are not open to the public. Others suggested exploring possibilities to open cafés within library facilities or charge for photography opportunities.
- **Enhance partnerships with nonprofits.** MPL could tap into Milwaukee's strong [nonprofit network](#) by exploring opportunities to contract for use of library facilities for events, as well as for library services and programming. This not only could provide MPL with extra revenue, but would also reinforce the perception that the library is a community-oriented institution. Both this and the broader earned revenues option cited in the previous paragraph would benefit from carefully-planned business models that first would determine viability and then could be used to guide implementation.
- **Provide paid option for those seeking enhanced library services.** The Task Force briefly explored the partnership model between the Milwaukee County Zoo and the Zoological Society of Milwaukee. That relationship features a "Zoo Pass" administered by the Society, under which it receives revenues for those who wish to pay an upfront fee that entitles them to multiple visits. In exchange for that revenue, the Society makes a direct annual payment to the zoo and also runs programs, provides signage, and contributes in other ways. MPL does not charge admission so a similar "membership" model would not work, but MPL could explore what "enhanced" or frequent user services could look like for a small subset of its patrons and whether it could establish a partnership with its foundation to offer those services and share revenues.

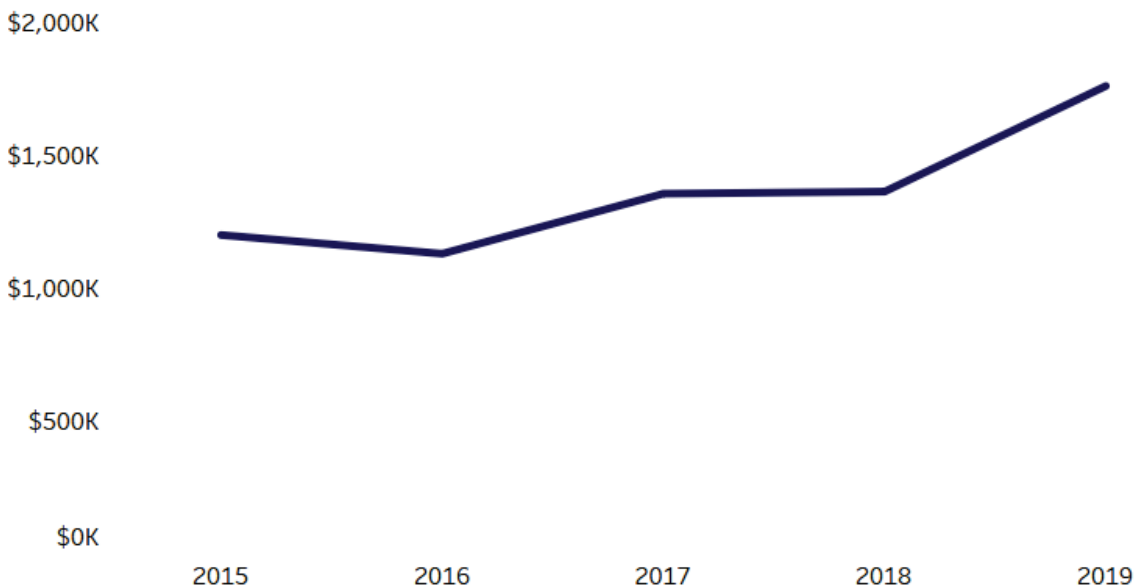
#### *Enhanced role for the Foundation coupled with city funding commitment*

While the group felt that all of these ideas held some promise, Task Force members also agreed that such revenue possibilities would not be lucrative enough to meaningfully change MPL's fiscal paradigm. Consequently, the short-term solution that engendered the most detailed discussion was the possibility of carving out a larger role for the MPL Foundation in assisting MPL with potential

funding gaps or asking it to use portions of its existing annual contribution to avert branch closures or other undesirable options that may be necessitated by the city's ongoing budget challenges.

In a January presentation to the Task Force, MPL leaders noted that "Foundation support has been growing and serves to provide strong programming enhancements and new initiatives that support our mission." As shown in **Chart 6**, the Foundation's contribution to MPL has grown in each of the last four years, rising from \$1.1 million in 2016 to \$1.8 million in 2019 (55.9%). Over the same time period, as noted above, the city's appropriation to MPL – by far its largest source of revenue – dropped from \$23.5 million to \$23.0 million.

**Chart 6: Foundation Contributions to MPL, 2014-2019**



Given the threat that municipal appropriations will continue to fail to meet MPL's expenditure needs, it is logical to ask whether the Foundation might consider modifications to the manner in which it has traditionally supported MPL. That could take the form either of increased annual contributions or a change in how the Foundation's existing financial support is utilized.

An important consideration is that donor support for MPL through the Foundation is meant to complement, *but not supplant*, the city of Milwaukee's responsibility to be the primary means of financial support for library operations. In other words, Foundation funding supports library programs that would not be possible without its contributions, but there has always been a prohibition on using Foundation resources to support general operating costs.

Easing or eliminating that prohibition could be critical to mitigating MPL's fiscal challenges, but there are several potential negative ramifications, as well. For example:

- *Donor support might lag.* Currently, donors contribute to the Foundation with the knowledge that their support allows MPL to expand its programming but is not used to relieve the city of its financial obligation toward the library. If that assurance changes, it is possible that some donors would discontinue their support.

- *City might diminish its support.* While the city may need to reduce its appropriations regardless, there is a possibility that if the Foundation were to agree to take on a larger role, then the city would divest more heavily from MPL.
- *Potential for inconsistent revenue.* There is no guarantee Foundation revenue will increase in the coming years, making increased reliance on it somewhat risky.
- *Need to grow Foundation capacity.* It may take time, development of new fundraising strategies, and possibly additional staff for the Foundation to have the wherewithal to increase its contributions to more than the \$1.8 million it provided to MPL in 2019.

It is possible that some of these issues could be addressed by a Memorandum of Agreement between the Foundation and the city that would be approved by both the mayor and common council. Under such an agreement, the city could agree to a minimum annual appropriation for MPL operations (and perhaps a similar commitment to capital, as well) in return for expanded or modified Foundation support, including for everyday library operations. Milwaukee County has entered into similar agreements tying long-term public funding commitments to enhanced private support for some of its cultural institutions.

One obstacle is that the city's funding guarantee presumably would not be legally binding over the long term, as budgetary decisions are entrusted each year to the lawmakers then in office. Nevertheless, a written agreement approved by the current mayor and common council would be a strong commitment and may alleviate some of the concerns raised above.

Such an agreement also could speak to a larger role for the Foundation and its staff in programming or other MPL operations if that would be seen as a needed justification for either a larger financial commitment or agreement to use Foundation resources for general operating needs. Adding a Foundation board member who is a city of Milwaukee resident to the MPL Board of Trustees also may be seen as appropriate under such an agreement.

In discussing this concept, Task Force members acknowledged that a request to the Foundation for greater or different forms of financial support was a "big ask." There was consensus, however, that exploring such a change was justified given that the utility and effectiveness of the "add-on" programming the Foundation has traditionally supported would be diluted if MPL is forced to close branches or reduce hours in light of its financial constraints. Also, given that Foundation support does not typically cover the full cost of running the extra programming, MPL may have difficulty sustaining those programs anyway.

At the same time, members viewed the initiation of such discussion as an opportunity to more clearly define what the public-private partnership between the two entities should look like going forward. They agreed that Foundation leaders would be justified in seeking to jointly define what types of general operating expenses their contributions would support. They also saw opportunity for mutual agreement on specific possibilities like endowed positions or certain forms of general programming that would both assist MPL in bridging future budget gaps and satisfy private donors that their contributions were linked to specific programs or objectives.



## CONCLUSION

As the Milwaukee Public Library looks to the future, its challenges are daunting. Highly dependent on financial support from a city government that has its own severe revenue challenges and required to compete with other vital services like police and fire, MPL must prepare for a possible decline in its foremost source of funding. Yet, lacking the legal ability to generate greater public support on its own and constrained by its commitment to free or reasonably priced public access from asking for more from its users, MPL has limited options to address the prospect of reduced city support.

An option that does exist is to whittle away at that public access by closing branches or reducing hours, but MPL's leaders and stakeholders understandably bristle at that possibility. Indeed, at a time when a global pandemic has exposed the depth of racial and socioeconomic inequities in metro Milwaukee, the library's important role as a source of knowledge, education, and enrichment for all residents may now be more pronounced than ever.

Another option would be for city leaders to place a greater priority on MPL's services. In 2000, MPL's appropriation of \$20.7 million represented 4.6% of the city's general purpose spending. By 2020, this share had declined to 3.7%. The possibility of reversing this trend and devoting additional city property tax resources to MPL should be considered alongside other options cited in this report, but each of the functions with which MPL competes likely has its own compelling story that it could similarly use to justify greater city support.

MPL's Financial Sustainability Task Force wrestled with this dilemma over five two-hour sessions. There was widespread agreement during the first two meetings that the optimal solution would be a dedicated funding source for MPL that would eliminate its need to compete with other critical public services for finite city resources. However, lacking the authority to implement that solution without a change in state law, and recognizing the long odds against such a change, Task Force members instead turned their attention to solutions that could be pursued without state action.

They ultimately reached consensus that it would be most effective to attempt to build on MPL's strengths, the foremost of which is the strong support it already enjoys from private donors through the MPL Foundation. While acknowledging that such a move will rest on the Foundation's own fundraising prowess, members felt that Foundation leaders could craft a compelling message given the threat of reduced public access to MPL branches at a time when an economic crisis should be prompting libraries to *increase* their services for both children and adults. They also emphasized that enhancing the Foundation's role must be a two-way street involving a renewed definition of its public-private partnership with MPL and a possible maintenance-of-effort funding commitment by the city.

Finally, the Task Force felt it was important to underscore that an enhanced partnership between MPL and its foundation should be viewed not as a comprehensive solution, but as a "life preserver" that would buy some time before significant service reductions again may need to be contemplated. Ultimately, it will be essential for MPL to be included in any broader solution involving new countywide revenue sources for cultural, education, and quality-of-life entities in the city and county.

In adjourning, Task Force members re-emphasized that preserving MPL programming and services and averting branch closures should be high on the list of public policy priorities for all Milwaukee policymakers and citizens. It is hoped that this report will serve as both a wake-up call to the severity of the challenge and a rallying cry for a new level of public-private cooperation to address it.

## APPENDIX I: TASK FORCE MEMBERS

The Task Force was facilitated by the Wisconsin Policy Forum and the Milwaukee Public Library Director and its deliberations also involved other MPL officials and staff, as well as staff from the city of Milwaukee budget office. The members of the Task Force are listed below:

Jennifer Abele, UWM  
JoAnne Anton, Herb Kohl Philanthropies  
Melissa Baxter, Greater Milwaukee Committee  
Art Harrington, Godfrey & Kahn  
Judge Valarie Hill, Municipal Court  
Joe'Mar Hooper, Safe& Sound  
Nik Kovac, Alderman (MPL Trustee)  
Matt Kowalski, Generac Power Systems (MPL Trustee)  
Susan Lloyd, Lloyd Consulting  
Jim Marten, Marquette University (MPL Trustee)  
Larry Miller, MPS School Board (MPL Trustee)  
Joan Prince, UWM (MPL Trustee)  
Dan Renouard, Baird  
Tim Sheehy, Metropolitan Milwaukee Association of Commerce  
Shannon Sweek, Optum



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March 15<sup>th</sup>, 2021

February/March 2021 Director's Report

### Summary of activities

1. Participated in five online virtual visits with area legislators over the course of two days as part of Library Legislative Day. I reiterated with legislative staff how our system funding has supported libraries and communities through the pandemic and highlighted our high increase in the use of electronic resources in 2020.
2. Met on February 19<sup>th</sup> with the WPLC Advocacy group that is reaching out to state organizations like the LD&L (legislative arm of WLA) and COLAND to see how we can partner and inject additional funding into the successful Wisconsin Digital Library collection (aka OverDrive). We are meeting with both groups in late spring/early summer.
3. Attended the WPLC Board meeting and will take part in a small workgroup looking at updating bylaws for the WPLC.
4. MCFLS staff and Robert Trunley took part in virtual interviews in late February and early March. As of the writing of this report, we have narrowed our candidates to three qualified individuals who we will bring in for an in-person tour and interview. I also made a series of reference check calls on March 8<sup>th</sup> and 9<sup>th</sup>. A decision will be made by March 15<sup>th</sup>.
5. I continued assisting the Brown Deer Library in their move to their new location, including arranging to be on premise to help with setup of their library network in late February.
6. I've participated in two meetings with Bruce Smith of DPI who is leading the charge on a PLSR proposal to change how statewide delivery is governed and organized. The current proposal would have the WPLC govern statewide delivery and hire a coordinator to manage contracts with logistics companies or systems. If approved by WPLC it would give each system (and by extension our members) a say in how statewide delivery is performed.
7. Created the amendment to the West Milwaukee contract that would include language allowing access to electronic resources (hoopla and OverDrive) for West Milwaukee residents. The last document needed will be creating the first version of an annual file showing their costs based on usage (including administrative costs).
8. I am pleased to report ALL fifteen member libraries submitted their DPI annual reports on or before March 1<sup>st</sup> in compliance with the statutory deadline.

### Upcoming Activities

1. Work with Judy Kaniasty and staff to prepare for onboarding our new staff member.
2. Meeting with Joan Johnson to discuss Resource Library activities in late March.
3. Bring a proposal for a new half-time marketing staff person to the April MCFLS Board meeting.