MILWAUKEE COUNTY
FEDERATED LIBRARY SYSTEM

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Notice

Milwaukee County
Federated Library System
Library Directors Advisory Council

Regular Meeting
Thursday, December 6th, 2018
9:00 – 11:30 AM

This meeting will be held in a meeting room of the
Greenfield Public Library
5310 West Layton Avenue
Greenfield, WI 53220

Agenda
The LDAC reserves the right to take action on any of the items listed below

1. Call to order

2. Additional agenda items/adoption of agenda

3. Approval of minutes for the November 1st, 2018 LDAC meeting
   Action   Attachment A   **Page 3**

4. Update on PLSR Recommendation process and survey
   Attachment B   **Page 11**

5. MCFLS Strategic Planning update
   Attachment C   **Page 46**

6. Annual report preview
   Attachment D   **Page 47**

7. Inclusive services guidelines

<div align="right">Attachment E   **Page 48**</div>

8. Due slips with "You've just saved..." now available

<div align="right">Attachment F   **Page 69**</div>

9. Proposed changes to circulation inserts/forms
    a. C-92: Damaged and Missing Items Procedure
    b. FL-37: Examples of Acceptable IDs

<div align="right">Attachment G   **Page 70**</div>

10. Bootleg materials in circulation

11. WPLC OverDrive Instant Digital Card fact sheet

<div align="right">Attachment H   **Page 74**</div>

12. LD&L Update

13. Additional business

14. Member library updates

Sub-committee agendas and minutes
Circulation Services— Agenda and minutes available at
http://www.mcfls.org/staff-circ-services-comm.asp
Youth Services— Agenda and minutes available at
http://www.mcfls.org/staff-youth-services-comm.asp
Young Adult Services— Agenda and minutes available at
http://www.mcfls.org/staff-young-adult-services-comm.asp
Adult and Reference Services— Agenda and minutes available at
http://www.mcfls.org/staff-reference-comm.asp.

The next meeting is scheduled for Thursday, January 3rd, 2019, at the Greendale Public Library, 5647 Broad Street, Greendale, WI 53129

Milwaukee County Federate Library System
Library Directors Advisory Council
Regular Monthly Meeting held Thursday, November 1, 2018
Franklin Public Library
9151 W. Loomis Road
Franklin, WI 53132

Present: Pat Laughlin, Chair, Hales Corners Library
                Rachel Arndt, Milwaukee Public Library
                Rachel Collins, Shorewood Public Library
                Susan Draeger-Anderson, North Shore Library
                Amy Krahn, St. Francis Public Library
                Jill Lininger, Oak Creek Public Library
                Jennifer Loeffel, Franklin Public Library
                Pete Loeffel, Wauwatosa Public Library
                Judy Pinger, Milwaukee Public Library
                Brian Williams-VanKlooster, Greendale Public Library

Excused: Dana Anderson-Kopczyk, Brown Deer Public Library
                Nan Champe, South Milwaukee Public Library
                Sheila O'Brien, Greenfield Public Library
                Nyama Reed, Whitefish Bay Public Library
                Rebecca Roepke, Cudahy Family Library

Absent: Michael Koszalka, West Allis Public Library

MCFLS Staff: Steve Heser, Director
                Judy Kaniasty, Business Manager
                Jen Schmidt, Library Systems Administrator

Call to Order. The regularly scheduled monthly meeting of the Milwaukee County Federated Library System Board of Trustees' Library Directors Advisory Council was called to order by Chair Laughlin at 9:12 a.m. Franklin was thanked for hosting the meeting.

Additional Agenda items/Adoption of Agenda. Chair Laughlin inquired whether there were any additions to the agenda. The following topics were suggested:
-       Narcan Nasal Spray/Pat Laughlin
-       WiFi Hotspots/Steve Heser
-       Winselect Replacement/Steve Heser
-       Continuing Education Program Suggestions/Steve Heser
-       CFRA Marketwatch Update/Steve Heser
-       Sierra Training Competencies/Jen Schmidt
-       LD&L Report/Pete Loeffel
Susan Draeger-Anderson moved and Amy Krahn seconded a motion to modify the agenda to add the suggested topics. Unanimously approved.

Approval of Minutes for the October 4, 2018 LDAC Meeting. Chair Laughlin referred to the minutes of the October 4 meeting. Susan Draeger-Anderson moved and Jill Linger seconded a motion to approve the minutes as presented. Unanimously approved. Attachment A of the agenda packet.

2019 MCFLS Budget. Steve Heser reviewed the 2019 MCFLS budget which was approved at the October 15th MCFLS Board and which is shown as Attachment B of the agenda packet. Discussion ensued regarding whether to transfer funding ITiva telephone notification subscription costs to members in 2020 or not and it was decided to see what other Systems are doing before making a final decision.

MCFLS Strategic Planning Update. Steve Heser reviewed Attachment C of the agenda packet which is a timeline developed by WiLS for the 2018-2019 MCFLS strategic planning process. Based on a recent poll, the most probable date for the all-day development planning meeting will be Thursday, February 28th. Steve Heser added that WiLS would find member library strategic plans useful in that knowing what member libraries goals are would aid in melding those with MCFLS' upcoming plan. The location for the all-day development session used last time around was the UW-Extension Grand Avenue Mall location in downtown Milwaukee and it was felt that that location worked well and the cost was reasonable; the feeling of the group was that that location would work well again.

2019 LDAC Chair. Steve Heser referred to Attachment D of the agenda packet which lists LDAC chairmanship since 19173 and based on the current methodology (alphabetical order by member library name) the rotation would be Milwaukee. Judy Pinger and Rachel Arndt indicated they would be willing to co-chair if desired since they both are busy with work projects that would prevent either one to do it alone and suggested that they be considered for the 2020 chairmanship. Susan Draeger-Anderson offered to chair in 2019 if that would make it easier for them—and they were grateful to have that option. Jill Lininger moved and Amy Krahn seconded a motion to approve the nomination of Susan Draeger-Anderson from North Shore Library as the 2019 LDAC Chair. Unanimously approved.

Final 2019 LDAC Meeting Locations. Steve Heser referred to Attachment E of the agenda packet thanking those that will be able to host meetings in 2019. Steve also passed around a list of dates for 2019 MCFLS Board meeting dates encouraging directors to host a meeting as the MCFLS Board is really interested in seeing member libraries and hosting a meeting is a perfect way for the MCFLS Board to get out and receive a tour of your building. Steve reported that Elizabeth Suelzer from West Allis has been approved by the County Board to replace Martin Lexmond on the MCFLS Board and that a couple other leads are being considered for the two vacancies that currently exist on the MCFLS Board at this time.

2018-2022 LSTA Strategic Plan. Steve Heser noted that Rachel Arndt and Brian Williams-VanKlooster serve on the LSTA Advisory Committee. Judy Pinger will be replacing Rachel Arndt in the near future; there are a total of eight library representatives statewide that advise DPI and the group has developed a five-year plan and the focus of the mission is contained in Attachment F of the agenda packet. Rachel Arndt explained the thinking behind the changes in funding and that previous funding for non-competitive technology grants is set aside for possible system mergers and out of the box services; a major goal is to move away from competitive grants totally and move towards more long term learning opportunities to prepare recipients with the knowledge to follow through on future grants.

DPI Digitization Kits.
Jen Schmidt referred to Attachment G of the agenda packet which lists the contents of the digitization kits library systems are able to acquire for their member libraries and will be paid for with WISELearn funding through DPI. MCFLS will be receiving a kit by the end of the year and the MKE Mixer group will

be approached by MCFLS to add this kit to their collection of kits available to member libraries. This kit will be used by library staff only and the next phase of this statewide digitization project will be to write a presentation plan and best practices/"how-to-use instructions for the kits. Brian Williams-VanKlooster noted that Recollection Wisconsin already has standards for digitizing materials and Jen Schmidt and Judy Pinger will work with that information to write up a procedure for MCFLS member libraries. Discussion ensued regarding what other equipment could be useful to extend this kit and it was suggested that equipment to digitize oversized items and non-paper items. It was suggested that server space be made available and again the Recollect Wisconsin project was mentioned as a possible solution to this question as they host library digitized collections around the State.

BREAK

Possible Settings Change for Sierra Paging Process. Jen Schmidt reported that there is a setting change in Sierra set at 48 hours before a paging slip is moved to another library to fill a hold and she wonders whether any exclusive period is necessary now due to quick delivery process which could make patron service even better. Discussion ensued with the key question being what is best for the patron is what should be done and it was decided to not pursue any changes to current procedures at this time.

Collection HQ Update. Jen Schmidt reported that beginning in December reports will be available for suburban libraries which will be useful to libraries for comparative reasons. Since MPL and the suburban libraries are on separate databases it is wise to check Milwaukee's holdings if you see a title listed as having the last copy of a title. Regarding the Grubby Report, the target can be changed from the 40 circs which is the current threshold if desired by letting Jen know as each library can have their own settings for that report. Libraries are starting to use the product and reports are making it easier to let go of items based on facts. Jen noted that the Adult & Reference Committee will be looking at CollectionHQ at an upcoming meeting.

2018 WLA Conference. Those that attending the meeting reported on the value of the sessions they attended and the important meetings that were also held during the conference: WPLC, SRLAAW, WLA Silent Auction, self-publishing, library fines, strategic planning and leadership, planning to pay for big-ticket items, crisis prevention, sexual harassment and library boards/advocacy.

ADDITIONAL BUSINESS.

Narcan Nasal Spray. Brian Williams-VanKlooster reported that the Greendale Health Department and Police are offering training to department staff and will also provide two doses and he wonders what other member libraries might be doing in this regard. After discussion it was the general feeling to call 911 and allow first responders to interact with patrons needing medical attention and to not put staff in harm's way, however training for staff is felt to be useful.

WiFi Hotspots. Steve Heser reported that the three WiFi hotspots from T-Mobile are ready for libraries to use which are checked out from MCFLS for library staff needs. The units use static IPs so staff can access Sierra through it without any fuss. Sierra would need to be installed on the laptop and no VPN is needed. If using a scanner to checkout materials on the laptop, the scanner software would also need to be installed on the laptop. Steve Heser confirmed that if libraries want to use their own static IP address with their WiFi hotspot, they can be added to the MCFLS firewall.

WinSelect Replacement. Steve Heser reported that MCFLS's Hieu Tran is working on finding a replacement for WinSelect software which libraries use since it is being changed from a one-time $45 per computer cost to an annual subscription product and he recommends libraries use Windows Group Policies to lock down computers which is free. Hieu will be switching libraries to this new product and if your library doesn't usually utilize Hieu's services but would like his assistance on this, reach out to him at MCFLS. Steve Heser also reported that Hieu Tran is also looking for a Deep Freeze replacement which would also be less expensive and that information will be shared when the testing is complete. Rachel Collins questioned an old FireFox browser/PayPal problem and Steve noted he would discuss with Hieu Tran and send out an email update.

Continuing Education Program Suggestions. Steve Heser reported that he will be attending a meeting regarding 2019 continuing education programming on November 27th and would appreciate any and all suggestions that he can take to that meeting for discussion purposes and consideration. Jill Lininger suggested "Ask A Manager" by Allison Green and Rachel Collins suggested "Adverse Childhood Experiences" which was held on the last day of WAPL. Steve encouraged suggestions be sent to him via email up until the meeting date.

CFRA Marketwatch Update. Steve Heser reported that not enough interest was shown for the $8,900 cost of the subscription and now the vendor has brought the cost down to $6,700 for all MCFLS member libraries and MCFLS will pay for 2019 with a one-year opt out clause so libraries can give it a try and see what statistics show for continuing into 2020 or not.

Sierra Training Competencies. Jen Schmidt questioned whether libraries are interested in having staff certified for Sierra Training competencies after a set amount of training sessions? Local libraries would need to buy-in to the idea and MCFLS could keep track of training session attendance if there is interest.

LD&L Report. Pete Loeffel distributed a handout, shown as Exhibit 1 attached to these minutes, which outlines the DPI 2019-21 Biennial Budget Request for Public Library System Aid and reviewed the contents which is requesting increased funding in 2020 and 2021.

MEMBER LIBRARY UPDATES.

St Francis – Amy Krahn reported that due to theft their video games have been moved behind the circulation desk and dummy cases are out on display.

North Shore – Susan Draeger-Anderson reported that so far one of her three communities approved the preliminary architectural and engineering study as long as the other two approve it, then the building project can move forward.

Franklin – Jennifer Loeffel reported that WiLS will be working with her Board on a strategic plan this month. A virtual reality center will open this weekend and it is paid for by an Eagle Scout. A Glow paint & Sip fundraiser is planned for January 11, 2019.

Milwaukee – Judy Pinger reported that in early January a diploma based Gale Career High School classes will be offered to 100 adult students in this first year. A Coordinator has been hired to develop a student curriculum. WiFi hotspots will be circulating to patrons soon.

Shorewood – Rachel Collins reported that she visited with Dawn Lauber recently and she extends a "hello" to all and that she is happily retired. A recognition pay program including merit and steps will be implemented with COLA raises every year and 4% merit steps every five years until staff reach the top of their pay ranges.

Greendale – Brian Williams-VanKlooster reported that Greendale is the Village of Festivals and this Friday there will be a Veteran Appreciation Day with honor guard. A Dickens of a Village runs in December. A8 18th annual Reading Rampage was held Saturday and all middle school students were invited; the community room was full of teenagers and there were prize drawings every hour and candy prizes too. It is the goal to market the event more to the community next year.

Oak Creek – Jill Lininger reported that a new full-time children's librarian started on Monday. Cell phone charging cables can now be checked out to be used in the library with a $10 replacement cost for non-return.

Wauwatosa – Pete Loeffel reported that Circulation Supervisor Tristan Marshall has been awarded the City Staff award this year and she will be honored at the employee recognition event tonight.

Hales Corners – Pat Laughlin reported that the community has recently implemented a community voting board and how will decide how to share the results of those questions.

SUB-COMMITTEE AGENDAS AND MINUTES. The agenda notice contained web-links to the Circulation Services, Youth Services, Young Adult Services and Adult & Reference Services agendas and minutes.

NEXT MEETING. Scheduled for Thursday, December 6, 2018 at the Greenfield Public Library, 5310 West Layton Avenue, Greenfield, WI 53220 beginning at 9:00 a.m.

ADJOURNMENT.

DPI 2019-21 BIENNIAL BUDGET REQUEST

DECISION ITEM 7001 – PUBLIC LIBRARY SYSTEM AID

361 – Aid to public library systems
s. 20.255 (3) (qm)

FISCAL SUMMARY		
	2019-20 Request	2020-21 Request
Requested Funding	$17,013,100	$19,013,100
Less Base	$15,013,100	$15,013,100
Requested Change	$2,500,000	$4,000,000

Request

The department requests increases of $2,500,000 SEG in FY20 and $4,000,000 SEG in FY21 for the appropriation for aid to public library systems to support the operations and maintenance of public library services in Wisconsin.

Background

There are 16 public library systems in Wisconsin. Over the past 30 years, these systems have developed strong programs of service for their member libraries, including resource sharing and open access for all state residents. The Public Library System Aid Program is the primary state mechanism to support public library services in Wisconsin.

Aid is paid to library systems based on the formula specified in Wis. Stat. sec. 43.24. Each system must have on file a plan approved by the department for the use of state aid it will receive as a condition of receiving aid. No more than 20 percent of the aid received can be used for administrative purposes.

Prior to the passage of 2017 Act 59 (Act 59, the 2017-19 biennial budget), state statutes required the department to include in its biennial budget submission a request for a funding adjustment for public library system aid equal to 13 percent of (estimated) prior year local and county expenditures for all public library systems in the state. This formula was referred to public library system aid indexing, structuring state aid for public library systems as a reimbursement for county expenditures.

Indexing was recommended by a Legislative Council study committee in 1978 at a level of 20 percent. The legislature adopted system aid at 11.25 percent for 1981. The indexing level was increased to 13 percent in 1986 by the legislature, as a result of the Task Force on Library Legislation. The 1993-95 biennial budget bill (enacted as 1993 Wisconsin Act 16) eliminated the 13 percent indexing level. However, under 1997 Wisconsin Act 150, the indexing of public library system aid was again incorporated into state law. The department was required to include a biennial budget request to bring state funding for public library systems to the 13 percent index level. Finally, under Act 59, the indexing requirement was eliminated.

Funding History

Prior to the passage of 2003 Act 33 (Act 33, the 2003-05 biennial state budget), public library aids were fully funded with GPR. Under Act 33, a supplemental public library aid appropriation was created and funded with funds from the Universal Services Fund (USF), one of the state's segregated (SEG) funds. Public library systems were funded from a combination of the two appropriations through FY09. At that

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time, approximately 15 percent of the total library system aid came from SEG funding; however, over the course of the next two biennia, the share of state aid funded with SEG funds increased to 33 percent, as the legislature shifted more funding from GPR to SEG. The 2009-11 biennial budget (2009 Act 28) deleted the GPR appropriation entirely and the SEG appropriation was increased, becoming the sole funding source for state aid to library systems.

Under 2011 Act 32 (Act 32, the 2011-13 biennial budget), funding was decreased, by $1,668,100 SEG in both FY12 and FY13, representing a ten percent cut to the appropriation. In addition, Act 32 removed the requirement that municipalities, counties, and joint public libraries meet a maintenance of effort (MOE) requirement to maintain annual local expenditures for public libraries at the average of the prior three years as a condition for being a member of a public library system. The legislature continued to fund state aid for public libraries at a constant level throughout the 2013-15 and 2015-17 biennia. Finally, Act 59 provided additional funding, on a one-time basis, of $500,000 SEG in FY18 and $1,000,000 in FY19 above the FY17 base. As directed by Act 59, the FY19 base appropriation for Public Library System Aid will revert to the FY17 level of $15,013,100 for the upcoming 2019-21 biennium.

Estimated Cost Increases

Local public library system expenditures are projected to grow by 1.6 percent annually in 2019 and 2020. Assuming this level of growth in local expenditures, if funding for state library system aid is not increased, then state aid, as a percent of local expenditures, will continue to fall, from 6.7 percent for FY19 (as a result of the one-time increase in system aid), to 6.2 percent in FY20 and 6.1 percent in FY21. Appendix A shows the history of local expenditures and state aid, from 2003 (FY04) through 2018 (FY19); as well as the projected local expenditures for 2019 (FY20) through 2020 (FY21).

Participation in public library systems is voluntary. The present level of funding jeopardizes the current status of full participation by all libraries in the state. If public libraries do not participate, access to public library service by non-residents is reduced or eliminated. In order to ensure continued participation by all public libraries, public library systems must provide a level of service that makes participation desirable and beneficial to its member libraries. Without adequate funding, public library systems will not be able to provide this level of service.

Proposal

The department is requesting an increase in funding aid to public library systems, by $2,500,000 SEG in FY20 and $4,000,000 SEG in FY21, to consistently support operations and maintenance of public library services in Wisconsin in a way that is sustainable for member libraries and the state's residents.

The funding is requested in part to maintain the one-time increases that were provided under the appropriation under 2017 Act 59. The Wisconsin Library Association has identified several priorities for which additional funding increases would be directed, to address workforce development, technology infrastructure, and promotion of lifelong learning. For example, additional funds could be used to expand online courses offerings and technology training opportunities to help people with new careers and mid-career changes; to expand technology services to all areas of the state, such rural or low-income communities, and include wireless hotpots, local area networks, technology equipment for maker spaces and digitization services; and to support various activities for residents of all ages that promote lifetime learning, such as early literacy, summer reading, and STEM programs.

Statutory Language

The Department is not proposing any statutory language related to this request.

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APPENDIX A (DIN 7001)
Public Library Systems: History of Local Expenditures, Appropriations for State Aid and Indexing Levels

Calendar Year	Local Expenditures	Change from Prior Year	State Fiscal Year	Chapter 20 Appropr.	Fund Source	Change in Appropr.	Aid as Percent of Prior CY Expenditures	Applicable Index Level	Aid at Applicable Index Level	Funding Required to Meet Index
1995	$112,166,202	4.3%	FY96	$11,772,200	GPR	0.0%	10.5%	N/A^	N/A^	N/A^
1996	$118,779,997	5.9%	FY97	$11,772,200	GPR	0.0%	9.9%	N/A^	N/A^	N/A^
1997	$124,853,188	5.1%	FY98	$12,863,800	GPR	9.3%	10.3%	13.00%	$16,230,900	$3,367,100
1998	$132,187,413	5.9%	FY99	$13,249,800	GPR	3.0%	10.0%	13.00%	$17,184,400	$3,934,600
1999	$138,103,970	4.5%	FY00	$13,749,800	GPR	3.8%	10.0%	13.00%	$17,953,500	$4,203,700
2000	$146,595,029	6.1%	FY01	$14,749,800	GPR	7.3%	10.1%	13.00%	$19,057,400	$4,307,600
2001	$156,544,138	6.8%	FY02	$14,749,800	GPR	0.0%	9.4%	13.00%	$20,350,700	$5,600,900
2002	$165,845,014	5.9%	FY03*	$14,196,700	GPR	-3.7%	8.6%	13.00%	$21,559,900	$7,363,200
2003	$172,147,125	3.8%	FY04	$14,196,700	GPR/SEG	0.0%	8.2%	13.00%	$22,379,100	$8,182,400
2004	$177,119,101	2.9%	FY05	$14,196,700	GPR/SEG	0.0%	8.0%	13.00%	$23,025,500	$8,828,800
2005	$185,169,732	4.5%	FY06	$14,908,600	GPR/SEG	5.0%	8.1%	13.00%	$24,072,100	$9,163,500
2006	$192,192,100	3.8%	FY07	$15,521,200	GPR/SEG	4.1%	8.1%	13.00%	$24,985,000	$9,463,800
2007	$197,355,785	2.7%	FY08	$16,138,000	GPR/SEG	4.0%	8.2%	13.00%	$25,656,300	$9,518,300
2008	$205,696,696	4.2%	FY09	$16,783,500	GPR/SEG	4.0%	8.2%	13.00%	$26,740,600	$9,957,100
2009	$211,137,195	2.6%	FY10	$16,165,400	SEG	-3.7%	7.7%	13.00%	$27,447,800	$11,282,400
2010	$215,123,445	1.9%	FY11	$16,681,200	SEG	3.2%	7.8%	13.00%	$27,966,000	$11,284,800
2011	$216,886,354	0.8%	FY12	$15,013,100	SEG	-10.0%	6.9%	13.00%	$28,195,200	$13,182,100
2012	$213,620,201	1.5%	FY13	$15,013,100	SEG	0.0%	7.0%	13.00%	$27,770,600	$12,757,500
2013	$217,095,564	1.6%	FY14	$15,013,100	SEG	0.0%	6.9%	13.00%	$28,222,400	$13,209,300
2014	$223,379,348	2.9%	FY15	$15,013,100	SEG	0.0%	6.7%	13.00%	$29,039,300	$14,026,200
2015	$232,086,772	3.9%	FY16	$15,013,100	SEG	0.0%	6.5%	13.00%	$30,171,300	$15,158,200
2016	$225,380,497	-2.9%	FY17	$15,013,100	SEG	0.0%	6.7%	13.00%	$30,774,700	$15,761,600
2017-Prelim.	$229,895,514	2.0%	FY18**	$15,513,100	SEG	3.3%	6.7%	13.00%	$31,390,200	$16,377,100
2018-Est.	$238,765,401	3.9%	FY19**	$16,013,100	SEG	3.2%	6.7%	13.00%	$32,018,000	$17,004,900
2019-Est.	$242,580,424	1.6%	FY20	$15,013,100	SEG	-6.2%	6.2%	N/A^	N/A^	N/A^
2020-Est.	$246,395,446	1.6%	FY21	$15,013,100	SEG	0.0%	6.1%	N/A^	N/A^	N/A^

*FY03: The appropriation under 2001 Act 16 was $14,749,800, but under 2001 Act 109 (budget adjustment bill), the appropriation was reduced to $14,196,700.

**FY18 and FY19: The appropriation under 2017 Act 59 was increased funding on a one-time basis by $500,000 SEG in FY18 and $1,000,000 in FY19 above the FY17 base.

^NA: The requirement to index Public Library System Aid to 13% was eliminated under 1993 Act 16; then, under 1997 Act 150, the department was required to request funding in an amount that would bring state aid to the 13% index level. The 13% index requirement was again eliminated under 2017 Act 59.

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PLSR Steering Committee Report Draft Version 6
Executive Summary

1. **Develop System Standards, Best Practices, and Accountability**

   Establish mandatory system standards to ensure equitable delivery of services to member libraries in all parts of the state.

   Create a formal mechanism for library systems to define best practices outside of system standards and make those best practices available to all library systems in the state.

2. **Incentives for Change**

   The Steering Team recommends the Department of Public Instruction develop and support, with the assistance of an appointed committee, an incentive program that will encourage consolidations of Library System services to local libraries that would include voluntary mergers among the current 16 Wisconsin Public Library Systems and participation in regional or statewide services, for the purpose of reducing administrative costs in order to achieve equity in service delivery to Wisconsin public libraries and to improve and/or expand services to all Wisconsin residents.

3. **Reduce the Number of Systems**

   The PLSR Steering Committee recommends that the current number of regional public library systems be reduced.

4. **Evaluate Funding Distribution**

   The Steering Committee recommends the Department of Public Instruction appoint a study group tasked with conducting a thorough analysis of the current funding formula, including practices utilized to apportion state aids for regional library systems. As a component of this investigation, the study group shall explore and propose alternative funding formulas, methods of apportionment, or other solutions with potential to improve equity of access to high-quality library services. The Steering Committee further recommends that any actual funding change be accompanied by an increase in state aid to library systems, in order to assure that no library patron experiences a decrease in service due to adverse impacts upon any library system.

5. **Delivery Pilots**

   The PLSR Steering committee recommends that the Superintendent of the Department of Public Instruction initiate one or more pilot projects relating to library delivery services. Such pilot projects shall have the overarching goals of A) proving concepts relating to the PLSR Delivery Work Group Report, B) decreasing wait times for patrons, C) improving overall resilience of delivery services on a statewide basis, and D) reducing duplicated efforts.

6. **Discovery Layer**

   The Department of Public Instruction will engage with topical experts, regional public library systems, and the library community at-large to create an effective, well-managed, state-scale library discovery layer.

7. **Learning Management System for Professional Development**

   Create and deploy a learning management system capable of A) housing and delivering content related to library professional development, B) managing a paperless system of certification and validation, and C) offering a statewide calendar of professional development opportunities for librarians and trustees.

PLSR Steering Committee Report Draft Version 6
Version of report draft upon adjournment of the in-person committee meeting on November 7, 2018

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PLSR Steering Committee Report Draft Version 6
Version of report draft upon adjournment of the in-person committee meeting on November 7, 2018

PLSR Steering Committee Report Draft Version 6
Version of report draft upon adjournment of the in-person committee meeting on November 7, 2018

Background

At their meeting in August 2012, System and Resource Library Administrators Association of Wisconsin (SRLAAW) conducted a summit and subsequent survey to examine how library systems could continue to most effectively deliver services to their member libraries. This action was largely in response to shrinking governmental budgets and consolidation of public library systems in other states throughout the nation. The subsequent report, *Creating Effective Systems*, recommended a need to conduct further studies on library system services, size, and strategies for implementing optimally configured systems and establishing service and administrative standards for public library systems.[1]

During the development of the 2014-2015 biennial budget, the Joint Finance Committee recommended the Department of Administration analyze library systems to "conduct a study to identify potential savings in public library systems through consolidation, technology, efficiencies, LEAN practices and service sharing" in consultation with the Department of Public Instruction (DPI). The Governor deemed this recommendation unnecessary and vetoed it and acknowledged DPI as the appropriate agency to conduct such a study without the need for legislative directive.[2]

In response, DPI's Division for Libraries and Technology initiated a Lean System Study Work Group to examine demand for services by member libraries and the resources and capacity of public library systems to provide these services. This work group identified areas of service provided by library systems that could be made more efficient. The major recommendation was that study continue and experts from each topical area be tapped to develop further recommendations and implementation strategies.[3]

While the Lean System Study Work Group finalized their report, the Council on Library and Network Development (COLAND) appointed a workgroup in July of 2014 to develop a strategic vision for library systems in the 21st century. This workgroup presented a series of recommendations to State Superintendent Tony Evers in January of 2015[4]:

- Library Consulting - Leverage distributed expertise to provide specialized consulting, verified by DPI;
- Provide and Support Technology Access through aggregation of software and services including shared platforms and expertise;
- One State, One Collection;
- Resource libraries must redefine their value proposition for the twenty- first century;
- Delivery Service - Transition to multi-hub delivery network;
- Coordinate Electronic Resources - Maximize purchasing power;
- Continuing Education - Maximize impact of continuing education funding
- Eliminate statutory language requiring Department of Public Instruction (DPI) to request 13% for library system aid.

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COLAND included a road map and timeline with their recommendations to further study how public library systems could most efficiently and effectively deliver services in the topic areas identified by the Lean System Study Work group. The intent was to lead change at the local and regional level to maximize organizational resources and state funding in order to deliver the highest quality library services to Wisconsin residents for the tax dollars provided.[5]

Recommendation Development Process

In September 2015, the State Superintendent appointed an 11-member steering committee to oversee a multi-year project to re-envision how Wisconsin Public Library Systems serve Wisconsin's 381 public libraries. Membership was selected based upon library and system size as well as consideration for geographic distribution.

Members of the Steering Committee:

Name	Library	Type of Library	Role
Kent A. Barnard	Patterson Memorial Library, Wild Rose	Very Small Public	Member
Jon M. Bolthouse	Fond du Lac Public Library	Large Public, non-resource	Member
Beth A. Carpenter	Kimberly-Little Chute Public Library[1]	Mid-sized Public	Member
Bridget C. Christenson	Hatch Public Library, Mauston	Small Public	Member
John DeBacher	Department of Public Instruction	State Library Agency	DPI Liaison
Kristie L. Hauer	Shawano City-County Library	County Joint Public (& Rural)	Member
Paula Kiely	Milwaukee Public Library	Large Public & System Resource	Vice-Chair
Jessamyn C. Lee-Jones	Platteville Public Library	Small to Mid ··· Public (Small Resource)	Member
Bryan J. McCormick	Hedberg Public Library,	Public (&	COLAND

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[1] After appointment, Beth accepted a position with the Appleton Public Library.

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	Janesville	Resource; & COLAND)	Representative
Stephen R. Ohs	Lakeshores Library System	Small System	Member
John T. Thompson	IFLS Library System	Large System; LEAN team	Chair

[Insert Map of Steering Committee distribution with library system boundaries]

The State Superintendent charged the Steering Committee with providing strategic vision, oversight, and general leadership in the development of recommendations to update and refine the roles and services of Public Library Systems and maximize public investment in library systems and public libraries.[6]

The Steering Committee, as well as all workgroup members, were made up of volunteers who had other full time jobs. Recognizing this, the Steering Committee issued a nationwide Request for Proposal for a project manager to plan, organize, and implement a process focused on eliciting recommendations from the library community. The project manager was also charged with facilitating meetings and structuring the idea generation of the workgroups. Two responses were received. The Steering Committee selected WiLS as the project manager during a meeting held in October during the 2015 Wisconsin Library Association's Annual Conference.[7] The following core principles were adopted by the Steering Committee in December 2015:

- Communication is critical for the success of the process;

- The process relies on openness and trust from all participants;

- Information and data should be the bedrock of the process;

- Outside expertise will add credibility and weight to the outcomes;

- The process will be used to grow skills needed to maintain flexible and community-driven service into the future.

The project manager led the Steering Committee through a process to form topical workgroups in March of 2016. Members of the workgroups were selected from a pool of voluntary applicants. These members were assigned to workgroups based on their subject matter expertise or their status as a user or customer of a service area. Each workgroup was meant to address statutory library system obligations as defined by statute. Ultimately, the following 7 workgroups were formed:

- Chapter 43

- Collections[2]

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[2] Originally called XXXXX

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- Continuing Education/Consulting[3]

- Delivery

- ILL/ILS/Discovery[4]

- Resource Libraries

- Technology

These workgroups were instructed to research their service area extensively and meet regularly to develop recommendations to the steering committee for inclusion in their final report. Workgroups were also instructed to identify, illustrate, and contextualize existing inequities in library service throughout the state and focus on maximizing equity of access for the citizens of Wisconsin, not the libraries or library systems.[8] As workgroups developed recommendations, feedback was solicited from the library community in a number of ways, including: an external group of participants tapped to review findings through surveys, presentations made at the 2016 and 2017 Wisconsin Library Association's annual conference, monthly calls scheduled with SRLAAW, and virtual question and answer periods open to the public.[9] The Steering Committee also identified communication liaisons in each system to help disseminate information to member libraries and library boards. Final reports from each workgroup were delivered to the Steering Committee on April 2, 2018.[10]

After the completion of the workgroup phase, WiLS transitioned from an active project manager role to a administrative and logistics coordinator role. The Steering Committee awarded a bid from Russell Consulting to perform the role of facilitating meetings and the decision making process.

The Steering Committee reviewed workgroup recommendations independently, as well as more formally at two in-person retreats in February and April of 2018. During these retreats, two groups of collaborators outside of the committee were identified to help craft a final report.

Ten library professionals were selected from a pool of applicants to be Core Recommendation Collaborators (CRC). The Steering Committee selected the members of the CRC based on geographic area and type of library to attempt to instill diverse thought into the process. The CRC worked with the Steering Committee on developing and testing overarching models of governance that could accommodate the workgroup report recommendations. This work was facilitated by Russell Consulting and took place during two all day meetings.

The findings of this work was shared with the library community and officially made available for public comment from June 11 to July 20. All public comments were compiled by WiLS and made available to Steering Committee and CRC members.

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[3] Originally two workgroups, merged as overlap was identified.
[4] Originally two workgroups, merged as overlap was identified.

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A Model Recommendation Summit was held July 30-31 with XX participants joining the Steering Committee and CRC members to further test and discuss the model of governance. At the conclusion of the Summit, XX areas of consensus were identified.

The Steering Committee reconvened in person on August 16, to discuss the outcomes of the Summit and to begin to form concrete recommendations. Steering committee members were individually tasked with drafting concrete recommendations for review by the larger committee. A small writing subcommittee worked to refine the initial drafts and shared their progress with the Steering Committee

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Directives Gleaned from the Library Community through the Recommendation Development Process

The process of developing the recommendations contained in this report was robust. A wide range of stakeholder groups were consulted for feedback. Library directors, library staff, system directors, system staff, library and system board trustees, county officials, as well as past and present DPI officials were all involved in the process. Large amounts of project documentation were made available to these stakeholder groups, and feedback was received from individuals and boards at the library, system and county levels. The Recommendation development process culminated in a summit-style meeting, followed by a final public comment period on the content derived from that summit. The amount of feedback received by the Steering Committee was both significant and prescriptive. An effort was therefore made to distill key directives expressed by the community at-large.

Service improvements must benefit library patrons.

Wisconsin public libraries and systems have a strong history of working together to provide excellent services. One of the Principles of the Process is to "ensure all Wisconsin public libraries have the capacity to provide equitable access to excellent library services regardless of the race, ethnicity, income, gender, or employment status of the people they serve, or their location within the state". Any service improvements moving forward must fulfill this principle and ultimately benefit the end-user, the library patron.

Workgroup reports should be used as frameworks for specific service improvements.

The Workgroups consisted of service experts from across the state. The studies they completed of current service areas were thoughtful and in-depth. Inequities were examined, which led to recommendations for improving service. Upon review by the library community, several Workgroup recommendations garnered early support for service improvements in specific areas: delivery, discovery layer, technology, and the creation of a CE portal. The Workgroup reports provide a solid foundation for moving forward in these areas.

Take action now on recommendations with robust support.

The specific areas mentioned above represent areas of greatest need for libraries; areas that would provide immediate, positive impact on service to Wisconsin residents. With the Workgroup reports serving as frameworks for improvements, action must be taken quickly and purposefully. Some of the Workgroup recommendations require more significant changes in order to affect service improvement. For example, state-scale implementation of a service such as technology would require changes to governance structures, funding, administration, and would require widespread support from the library community. It became clear throughout the

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Recommendation Development Process that organic, non-mandated change should lead improvements forward.

Service improvements must be soundly-implemented.

Implementation of service improvements must be driven by effective research, planning, execution, and change-management. Implementation should also be supported by adequate resources. The library community expressed concerns about how administration, funding, and governance might change with proposed service improvements. Any service improvement moving forward must have a well-developed plan for how it will be managed, who will govern the service, how it will be implemented, how local relationships will be maintained or developed, as well as evidence of how efficiencies will be gained.

Potential Unintended Consequences Should Be Anticipated and Studied

Tweak and add content later.

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Recommendation 1 - Develop System Standards, Best Practices, and Accountability

Recommendation

Establish mandatory system standards to ensure equitable delivery of services to member libraries in all parts of the state.

Create a formal mechanism for library systems to define best practices outside of system standards and make those best practices available to all library systems in the state.

Summary

Library systems are required to provide a full range of services per Wisconsin State Statute 43.24 to qualify and maintain its eligibility to receive state aid. The purpose of standards for Wisconsin public library systems and system staff is to encourage the further development of quality service by providing public library systems with a tool to identify strengths, recognize areas for improvement, and strengthen accountability to member libraries. It could be unlikely that all systems would meet these standards with current state funding. Instead, systems may collaborate and/or consolidate in order to provide the level of service the standards would represent.

Wisconsin State Statute 43.24(3) currently allows the Department to reduce aid to systems if they don't comply with existing standards. Reduction in aid could place additional complications on a system to meet the standards. It is recommended that any system unable to adhere to the standards should be required to develop a 12-month compliance plan approved by the Division to maintain current aid levels. The compliance plan should include resources needed, collaborative and/or consolidation opportunities and a stakeholders' communication plan. . .

It is recommended that the library system standards mirror the design of the public library standards for ease of use. The sections should include:

- Statutory Requirements (Chapter 43.15; 43.16; 43.17; 43.19; 43.24; 43.58)
  - Systems
  - Library Membership
- Tier One, a system must meet all of the Tier 1 standards (base funding?)
- Tier Two, all of Tier 1 and all but two of the Tier 2 standards (performance incentives)

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It is also recognized that there are best practices in operating a library system that should not be necessarily addressed through formal standards but would be valuable in standardizing for further study and improvement of library systems in the future. For example:

- Accounting Standards

   The system business managers working with the the Public Library Data, Funding and Compliance Consultant build upon the work of the Funding Subcommittee to develop standardized revenue and expenditure accounts and terminology to provide consistent and uniform reporting of income and expenditures for the System Annual Reports and System Program Budgets and Plans.

- Consulting Services

   It is recommended that a team of system directors/consultants representing the 16 library systems along with Division representation develop a tracking system which uses the broad consulting areas identified in the PLSR Consulting Workgroup report as well as the type (email, phone, in-person, site) and number of interactions per year.

- Governance

   The level of individual board member awareness of library statutes and system operations can vary. A "Trustee Essentials" does not exist for system board members instead they rely on the more general version as their guide.

The creation of a formal mechanism to define best practices and standardization of data collection would better allow Wisconsin library systems to review the impact of the PLSR process on state residents as well as continue to improve system services into the future.

Value Proposition

Library services in the state are currently delivered to member libraries on an inequitable basis. Member libraries are often unaware of system standards and often systems use their best judgement in delivering services that may or may not be viewed as standard system services in other parts of the state. In 2013, SRLAAW created a set of voluntary standards to help with this, but service inequity continues. Creating mandatory standards would establish a baseline to ensure every library in the state has consistent expectations of service from their system. This will better enable local libraries to utilize local funding to augment system services in a way that best serves their community.

A substantial amount of time was spent during the PLSR process in gathering disparate data from systems to analyze system services and make recommendations for improvements. Sharing best practices and standard reporting practices between systems will better allow for

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the measuring the success of PLSR recommendations as well as making further analysis and improvements possible. In addition, especially with financial data, standardization will reduce the time required for mandatory reporting for all systems. Libraries will also be able to compare system services easily, allowing libraries to easily identify and correct inequities of service delivery that may arise in the future.

Suggested Implementation Process

- DPI Establishes Library System Standards Task Force - *December 31, 2018*
    - Model the process and document after the one used for current edition of the public library standards
      https://dpi.wi.gov/sites/default/files/imce/pld/pdf/wisconsin_public_library_standards_6th_edition_2018_final.pdf
    - Composition 6-7 Members: System Directors; Public Library Directors or Library Staff representing Grade 1, Grade 2 and Grade 3 libraries
    - Task force members should represent a diversity of locations and sizes of systems as service providers and of libraries as service recipients whenever possible. Individuals with experience with different libraries and systems would be a desired characteristic.
    - Public Library Development Team to act as Task Force Resources and Project Lead
- Review current accountability measures, what's working, what isn't
    - Currently there are several measures of accountability for library systems-- Governance; System Plan and Program Budget; System Annual Report; and System Plan and Program Budget.
- Release Draft for Comment - *April 1, 2019*
- Final Draft - *June 1, 2019*
    - Where should the final draft be submitted? Is this something that ultimately needs to go into statutes?
- Implementation - *July 1, 2019*
    - Sorting process: what could be done under ch 43, what are goals, administrative rules, best practices?
- Incorporate into System Planning Document - *August 1, 2019*
- Formalizing sharing of best practices
    - System Accounting Standardization
        - Convene Working Group of System Business Managers - *January 2018*
        - Release draft recommendations - *April 1, 2019*
        - Final Draft and Implementation - *June 1, 2019*
        - Incorporate into System Annual Report, Planning and Program Budget Documents - *July 1, 2019*
    - Consulting Services

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- Convene Working Group of Continuing Education Consultants - *January 2018*
- Release draft recommendations for tracking - *March 1, 2019*
- Incorporate any changes from library community - *May 1, 2019*
- Begin tracking CE/Consulting hours - *July 1, 2019*

○ Trustee Essentials
- DPI drafts Trustee essentials - *January, 2019*
- Draft Trustee essentials is presented at WAPL 2019 and shared with the community
- DPI incorporates suggestions received - *Summer 2019*
- Trustee Essentials formally adopted and distributed - *Winter 2019*

Suggested Funding Source(s)

- LSTA - reimbursement to task force and working group members for meetings to discuss and establish standards
- WISE - any sort of interoperability to share best practices between software systems or reporting forms, talking about data standardization, creating a best practices repository

Measuring Success

- Standards are drafted and adopted by SRLAAW and COLAND
- Number of systems who are able to comply with tier 1 standards
- Number of systems who can comply with higher standards
- Repository for best practices is created
- Number of objects in best practices repository
- Number of uses of objects in best practices repository
- Measurable equity component

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Recommendation 2 - Incentives for Change

Recommendation

The Steering Team recommends the Department of Public Instruction develop and support, with the assistance of an appointed committee, an incentive program that will encourage consolidations of Library System services to local libraries that would include voluntary mergers among the current 16 Wisconsin Public Library Systems and participation in regional or statewide services, for the purpose of reducing administrative costs in order to achieve equity in service delivery to Wisconsin public libraries and to improve and/or expand services to all Wisconsin residents.

Summary

This recommendation aligns with a series of studies documenting and analyzing the cost of providing services by regional library systems, which documented the duplication of services and administrative costs and suggested that opportunities to provide those same services at a reduced cost would lead to improved services throughout the State. Consolidation of services will lead to lower costs and increase equity of service delivery throughout the state. With statewide or regional services and fewer systems, cost savings could be used for to achieve equity or for expanding direct services to local libraries.
Following the PLSR process, consensus was built around these ideas. Consolidation of services and offering services on a regional, or in some cases, a statewide level and a reduction in the number of Systems would offer opportunities for reducing costs and improving services. Reductions in administrative costs would improve equity of service, increase efficiency of operations, and provide greater "protection" against financial downswings.
There is also a strong consensus that any mergers of Library Systems work best when voluntary and not mandated; further, it was agreed that incentives will help motivate systems to undertake the process. Attempts at merging systems or consolidating services can be challenging due to issues of local control, trust, and unclear processes and costs. There is no clearly articulated process, checklist, or step-by-step guide for implementing these types of changes. The DPI is well positioned to develop tools and to provide a level of support and consultation needed by library (and *library system*) administrators and boards.
The experience of individuals involved in both successful and unsuccessful mergers and consolidated services can provide valuable input in the development of these guides and should be asked to assist in their development and in identifying additional incentives, such as financial support for associated costs such as legal consultation and public relations.

Value Proposition

Providing services to local libraries through Wisconsin Public Library Systems is imperative for Wisconsin residents to have equitable access to quality services that meet their needs. The reduction of overhead and administrative costs associated with System operations through System mergers or service consolidation will benefit the equitable delivery of these services. While every merger or move to consolidate will be different, certain elements must be present to ensure success, including trust and commitment. The use of incentives can help fuel the

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motivation needed to undertake the challenge of merging systems or moving to regional/statewide service delivery. Financial incentives and professional support provided through DPI will help with the direct costs as well as the personnel costs. A successful merger and/or regionalized service can be a catalyst for encouraging others to consider merging. Incentives to consider include funding for both future and the change process, such as project management, consulting, legal fees, planning, facilitation, legislative support, fiscal analysis, and other related expenses. an action plan that can be followed, authoritative support from DPI, funding for project leadership and support staff. These changes, when supported financially and through expert professional assistance, can be empowering to those directly involved, and inspiring to others.

Suggested implementation process

Upon the adoption of this recommendation, the Department of Public Instruction should support mergers and/or regionalization of services, by appointing a small team consisting of DPI staff and subject experts who have experience with merging or consolidating services, to develop a step-by-step guide to assist systems that wish to voluntarily undertake such changes. DPI will identify resources to fund incentive grants and develop a process and application for awarding grants, that will cover costs related to project management, consulting, legal fees, planning, facilitation, legislative support, fiscal analysis, and other related expenses. At such time that Systems declare their interest in merging, DPI will play a leadership role in advising and guiding the systems. They will develop standards and best practices regarding accounting and bookkeeping practices to smooth future consolidation of services and/or systems.

Measuring success

Measuring the success of this recommendation will be in documentation of several deliverables and in the action taken on the part of library systems to merge with others or to consolidate their services with another system. Deliverable include: 1) A step-by-step guide to System mergers; 2) an incentive package to aid in Systems in these processes; and 3) a grants process and application.

Success will also be measured by at least one successful merger and one successful regionalization of services. Quantitative and qualitative measures will be made using evaluation tools such process surveys, satisfaction surveys, data analytics, interviews, etc., with the results published in local and national publications and presented at relevant conferences.

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Recommendation 3 - Reduce the Number of Systems

Recommendation

The PLSR Steering Committee recommends that the current number of regional public library systems be reduced.

Summary

Sixteen regional public library systems provide services to public libraries in Wisconsin. Many of these services -delivered at scale- are now relied-upon and save libraries hundreds of thousands of dollars on an annual basis. Since the passage of the legal framework allowing formation in 1971, systems have each evolved differently. Counties are the basic geographic building blocks for systems, thus systems range in size from ten counties, to single counties. Over a number of recent years, consensus has been growing among the library community that a strategic reduction in the number of regional systems (through consolidation) would help address service capacity issues. Adding to this consensus are a number of key reports by stakeholder groups, each insinuating potential service improvements resulting from a strategic reduction. These reports include:

- "Creating More Effective Public Library Systems" (2013/SRLAAW);

- "Lean System Study Work Group Recommendations" (2014/DPI)

- "Strategic Vision for Library Systems in the 21st Century" (2015/COLAND)

In addition to the above reports, the concept of a strategic reduction in the number of library systems was a key recommendation sent to the PLSR Steering Committee with a highly robust degree of support from the participants in the PLSR Model Development Summit.

Value Proposition

There are some areas of the state where there is great potential value to be gained from a reduction in the number of systems serving those areas. Achieved through consolidation, it is clearly possible that a smaller number of slightly larger multi-county federated library systems would be able to furnish member libraries (therefore also patrons) with a higher quality, more comprehensive set of services than most single-county library systems are able to provide.

In some regions of the state, strategic reductions in the numbers of systems will result in higher quality, more comprehensive set of services than most smaller library systems can provide.

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Suggested Implementation Process

In order to achieve the underlying goals of this recommendation, the following process (or some version thereof) is advisable:

- DPI should provide adequate resources and full support for implementation of recommendation #7 "Using Incentives to Drive System Mergers";

- Remove statutory barriers to library system mergers;

- Document and share best practices for library system mergers;

- Staffing changes, changes in leadership, etc. Consider consolidating through attrition;

- Engage DPI consulting when system director position is vacated to explore consolidation opportunities;

- Encourage Library Systems with 3 or fewer counties first;

- Support precursors to mergers, such as: Incentivize ILS mergers.

Measuring Success

- Fewer number of systems exist.

- A comparison of the list of services available to a member library of a single-county system pre-consolidation versus the list of services available to that same library after consolidation;

- A comparison of response times pre and post consolidation from the time a service is requested to the time the service is satisfactorily delivered (examples: resolution of IT help desk tickets, library consulting call-back times);

- A comparison of the net funding available via the system to member libraries pre and post consolidation.

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Recommendation 4 - Evaluate Funding Distribution

Recommendation

The Steering Committee recommends the Department of Public Instruction appoint a study group tasked with conducting a thorough analysis of the current funding formula, including practices utilized to apportion state aids for regional library systems.[5] As a component of this investigation, the study group shall explore and propose alternative funding formulas, methods of apportionment, or other solutions with potential to improve equity of access to high-quality library services. The Steering Committee further recommends that any actual funding change be accompanied by an increase in state aid to library systems, in order to assure that no library patron experiences a decrease in service due to adverse impacts upon any library system.

Summary

Each biennium, the Wisconsin legislature approves an amount of state aid intended to fund the operation of regional library systems. This appropriation is further apportioned to the regional systems by the Department of Public Instruction. In general, this process is conducted according to a combination of statutory imperatives and administrative procedures. This formula -- as originally written -- combines aspects of population, geographic area, and municipal, and county expenditures to determine the amount each regional system receives on an annual basis. In the late nineties, legislative events occurred which in effect "froze" the data sets used to calculate funding levels of that time. Therefore, for at least twenty years, apportionment of state aid to library systems has not been based upon up-to-date population demographics or municipal expenditures. This is at odds with the intent of the original formula design as well as the 1999 attempt to replace local expenditures with shared revenue.

Throughout the PLSR process, discourse about the appropriateness (or fairness) of the funding mechanism for regional systems has persisted throughout the library community. At least one alternative funding formula has been proposed, as well as a number of discrete factors that should be explored (such as poverty, unemployment, and infant mortality rates). It is the belief of the Steering Committee that a sufficiently vigorous investigation of possible alternatives to current practice should occur. Such an investigation should culminate in meaningful changes that improve equity of access to high-quality library services across Wisconsin, while ensuring no system sees a decrease in base funding.

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[5] The Department of Public Instruction provides a clear explanation of the formula and changes since it's inception at
https://wilibrariesforeveryone.blogspot.com/2015/05/calculating-state-aid-to-systems.htm)

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Value Proposition

System funding has a direct impact on local libraries' ability to provide quality services to patrons. To ensure every Wisconsin resident benefits from library services, funding should adequately support the *system services* that libraries need. By conducting a thorough and objective analysis of the current State funding formula, alternative formula options, and any potentially unintended consequences, a solid foundation will be achieved for further decision-making and consensus building.

Suggested Implementation Process

- Appoint an implementation team.[6]
- Conduct an in-depth analysis of the current funding formula, practices utilized to apportion state aids for regional library systems as described in the recommendation.
- A budget should be established to support the work of the task force including, but not limited to project management, a third party consultant, travel, printing, and other miscellaneous costs.
- The task force should be in place no later than March 2019, with their report due no later than September 2019.

Measuring Success

Success will be measured by 1) the quality of the final recommendation and the rigor used in its development; 2) the ability of funding levels to ensure that each system meet new standards of service; and 3) the level to which equity is achieved while holding systems financially harmless.

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[6] The Steering Committee recommends a small number (3-7) of topical experts. Makeup of the implementation team should minimize potential for conflicts of interest. https://www.google.com/url?q=http://knowledge.wharton.upenn.edu/article/is-your-team-too-big-too-small-whats-the-right-number-2/&sa=D&ust=1541014342685000&usg=AFQjCNEFA2abTUIOjDjMjMopoNQLjAjPSw

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Recommendation 5 - Delivery Pilots

Recommendation

The PLSR Steering committee recommends that the Superintendent of the Department of Public Instruction initiate one or more pilot projects relating to library delivery services. Such pilot projects shall have the overarching goals of A) proving concepts relating to the PLSR Delivery Work Group Report, B) decreasing wait times for patrons, C) improving overall resilience of delivery services on a statewide basis, and D) reducing duplicated efforts.

Summary

Physical resource-sharing generates tremendous value for libraries and, therefore, citizens. Sixteen independent regional delivery networks currently provide physical delivery of library materials between Wisconsin libraries. These regional networks are each operated and administered by regional public library systems. Each regional network's hub is, in turn, linked to the delivery service of the South Central Library System (headquartered in the metropolitan area of Madison, WI). The end result is a resource-sharing architecture whereby a library patron in Superior can request a library item from a library branch in Kenosha, and receive it in a number of days.

In their report, the PLSR Delivery Work Group produced a number of recommendations geared toward providing more equitable delivery services to all areas of the State. The end-model originally described by the Work Group features eight larger delivery regions -each with a single "hub" location- that are interlinked. This delivery network was envisioned by the Work Group to be funded and coordinated as a single statewide delivery service. This would be an extremely significant shift in how delivery is provided in Wisconsin: a fact that was confirmed through robust feedback received from the library community throughout the PLSR project.

It is of unique importance to note the role of the South Central Library System in statewide resource sharing. Statewide delivery exists in Wisconsin due to the South Central Library System's work in the early 1990's to establish it. As the service took on a life of its own, it required that SCLS relocate to a larger facility, and develop internal management and logistics structures to support both the statewide service and SCLS's delivery service to its member libraries.

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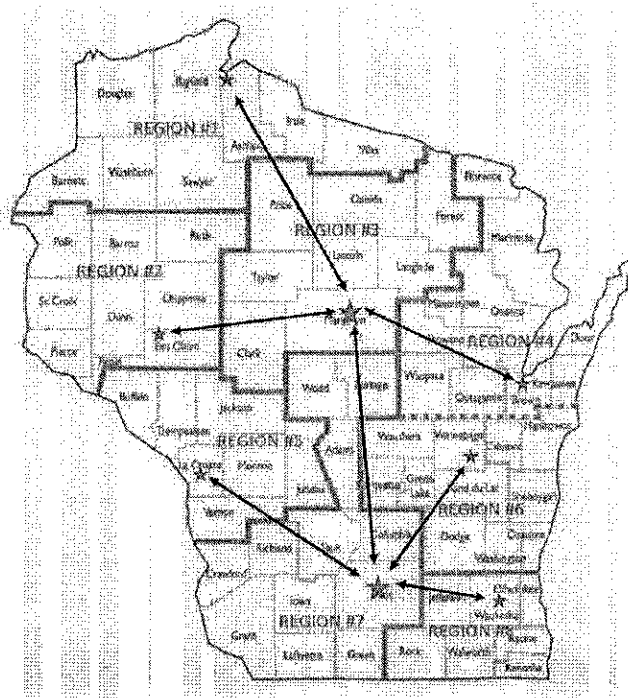
Value Proposition

- Through the pilot project approach, many of the concepts addressed in the Delivery Work Group report may be tested in a gradual fashion without putting the entire statewide infrastructure under stress.
- Equity of access to rapid, efficient delivery services will be increased in areas of the state under stress related to funding levels.
- Should the pilot project approach be successful, a blueprint will thus exist for further stages of transition.
- Should regional consolidations occur, efficiencies will be gained:
  - Transit times - resulting in patrons getting materials faster.
  - Miles travelled - resulting in fuel cost efficiencies.
  - Reduction of duplicated administrative overhead - resulting in economies of scale.
- Should regional consolidations of delivery occur -- either as part of a pilot project or in the latter stages of transition to the end-model proposed by the Work Group -- it is possible that existing regional library systems may see a reduction in delivery-related costs and a net increase in funding available for other services.

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Suggested implementation process

One of the most common themes expressed by the library community through feedback during the PLSR process is that change should be rooted in sound empirical research, well-planned, incremental, and voluntary. The Steering Committee understands that, in order to satisfy these imperatives, reinvention of library delivery services may unfold in a manner that differs from the exact path laid out in the Delivery Work Group recommendations. However, for the purpose of laying the first cobblestones of a path toward achievement of the vision laid-out by the Work Group, the following process may be used:

- Hire a project manager and appoint a small task-force to oversee implementation of one or more pilot projects related to delivery service.
- Identify regions of the state where delivery-related pilot projects would create the necessary data to determine if more wide reaching changes to delivery are in the best interest of the state.
- Work with systems in identified regions to coordinate delivery and establish a single hub.
- Further work with systems in identified regions to create a link to South Central Library System, and/or other links to any future additional regional hubs as described in the delivery workgroup report.
- Utilize the Delivery Work Group recommendations to guide further development of regions to establish suggested initial core statewide hub connections between regions in the south and north of the new model:
    - Working with the current Indianhead and Wisconsin Valley library systems to establish a northern hub to provide connection with a southern hub for statewide delivery.
        - This pilot would include most or all of regions #2 and #3 in the map below. It would include nonpublic as well as public library delivery clients.
        - Both of these systems use the same contracted vendor, which should make the transition easier.
        - Northern Waters Library System (region #1 below) could be added later, if this proof of concept is successful.
        - Regions #4 could also be added later, completing the proposed delivery plan for the northern part of the state.
    - Working with the current Winding Rivers, Southwest, and South Central Library systems to improve delivery service in the southwest region while also establishing as southern hub to connect to the north (see above).
        - Delivery in proposed region #5 (see map) would be provided by Winding Rivers.
        - Delivery in proposed region #7 would be provided by South Central.
        - Delivery in Southwest would be increased to 4 or 5 days depending on availability of resources.

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- o The advantages of these pilots are:
  - They demonstrate the feasibility of the new concept in both a vendor provided and library provided delivery environment.
  - By eliminating the current Western Route of the statewide delivery, those funds would be available for establishing a north/south hub connection. These hubs would replace the current route.
  - Nonpublic participants in the statewide network could be provided with increased frequency of delivery without increased cost.
  - The underserved libraries in the southwest could receive increased frequency of delivery without increased cost.
- Using an incremental implementation process, measure feasibility in an ongoing fashion through data gathering, cost analysis and evaluation of standards.
- A hybrid approach of contracted vendors and in-house delivery operations is needed for a stable delivery service.
- Any competitive bid processes will not make final decisions of service providers based on cost alone. The average per stop costs that currently exist in the state is essentially equal between the systems utilizing a contracted delivery service and those operating an in-house service. A balanced approach to maintain service stability can be done in a way that is also most cost effective.

The map on page XX shows the recommended eight regions model and possible hubs (starred on the map) in each region. While the delivery hubs will likely coincide with existing system or vendor locations in some regions during implementation, delivery hubs in this model are not fixed long-term as the potential for changing vendors through a competitive bid process may impact where a delivery hub is located.

Measuring Success

For the purposes of evaluation, a number of processes and data points could be gathered and analyzed at different times. To be sure, cost data (including "cost-per-stop"), transit metrics and patron wait-times should all be gathered at the beginning, during, and after "go live" of any delivery-related pilot projects and compared in an ongoing analysis. Doing this will ensure that success of the pilot(s) can be evaluated based on hard data. Service levels should also be evaluated throughout the process. For example, the number of delivery days per week should be analyzed across the state in order to demonstrate whether equity of access to high-quality service is increasing. In a more subjective -- yet important -- sense, satisfaction levels among libraries and patrons should also be gathered before, during, and after.

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Recommendation 6 - Discovery Layer

Recommendation

The Department of Public Instruction will engage with topical experts, regional public library systems, and the library community at-large to create an effective, well-managed, state-scale library discovery layer.

Summary

A "discovery layer" refers to the visual interface used by library patrons to find, identify, select, and obtain the various types of resources offered by the 21st century public library. These resources include physical books and audiovisual materials, as well as an ever-broadening variety of downloadable and streamable digital resources such as audiobooks, feature films, news and/or scholarly articles, and other digital content.

The PLSR process has resulted in an unprecedented degree of understanding in regard to the commonalities and differences between library management software products. Likewise, it has also produced greater awareness of how library patrons seek resources, how discovery services are provided by the current regional library systems, and how those services are funded and managed.

Also throughout the PLSR process, the concept of a state-scale discovery layer option has maintained a robust degree of support from project participants, the library community, and other stakeholder groups.

Goals of the Recommendation

- Achieve interoperability between the various library management software platforms used in Wisconsin (COLAND Strategic Direction #2);

- Provide a best-in-class search interface option that allows patrons seamless access to library collections (both physical and digital) across the state regardless of where they live (COLAND Strategic Direction #3);

- Reduce procurement, budgeting, training and technical administration efforts that are duplicated by the current sixteen regional systems in maintaining fourteen discrete online discovery platforms, and;

- Embrace the critical need of libraries (and regional systems) to make decisions and tailor services in response to the needs of library patrons where they are.

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- Add a bullet here pointing to possibility of opening up a new collaboration space in regard to making digital resources available - Badgerlink content, overdrive content, local collections or other content licensed locally or regionally.

Value Proposition

Wisconsin libraries already lead the nation in regard to sharing resources. However, the set of technologies relied upon to accomplish this are aging (for footnote: z39.50 originates in the 1970s). Successful creation of an effective, well-managed discovery layer at state-scale would improve services to patrons in the following ways:

- Library patrons would be able to search the collections of any public library in the state, obtaining rich, detailed and vibrant results that are optimized to achieve the shortest delivery time based on their geographic location;

- Library systems and/or individual libraries that do not have the resources to purchase or operate top-tier library management software would nonetheless benefit, dramatically increasing the baseline patron experience;

- Discovery-based interoperability between existing library management software would open up a significant new collaboration space - removing a barrier to new partnerships and allowing freer communication between libraries.

Suggested Implementation Process

- Hire or appoint a project manager and/or small task-force vested with the ability to drive the project;

- Conduct a general risk/benefit assessment in order to identify unanticipated consequences;

- Conduct a governance assessment in order to determine how decisions impacting the look, feel and function of the state-scale discovery layer will be made;

- Conduct a needs assessment to identify minimum technical requirements necessary to achieve interoperability between different library management software platforms;

- Identify a communication protocol that meets the above determined requirements for interoperability;

- Identify and use leverage to ensure that all major library software vendors doing business in Wisconsin support the chosen protocol or framework;

- Create, if necessary, an application capable of translating action messages between all major library management systems;

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- Explore the current capabilities of library software vendor discovery products, including open-source platforms;

- Conduct a fiscal assessment to determine costs when scaled to the entire state;

- Organize a process to evaluate and select a product that will serve as the state-scale discovery layer;

- Create a structure for ongoing evaluation and improvement.

Measuring success

It is recommended that a statewide "importance/effectiveness" survey be developed, and deployed both before and after implementation. This survey should include an in-depth list of currently available and desired features of library discovery software. By deploying the survey before and after, comparisons may be made and conclusions drawn. For example: if - after implementation - a significantly greater number of libraries report a significantly greater degree of access to features they deem as important, the conclusion may be drawn that the project resulted in better service to more libraries.

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Recommendation 7 – Learning Management System for Professional Development

Recommendation

Create and deploy a learning management system capable of A) housing and delivering content related to library professional development, B) managing a paperless system of certification and validation, and C) offering a statewide calendar of professional development opportunities for librarians and trustees.

Summary

Wisconsin is made stronger through a dedicated corps of library professionals. Like many other professions, ongoing professional development opportunities are needed to maintain a sharp edge. Wisconsin requires that library and regional system directors maintain certification through the Department of Public Instruction. This ensures that libraries are managed efficiently and effectively.

Historically, each regional library system has provided local professional development opportunities to its member libraries, and managed the process of certifying local staff. As the availability of new learning technologies has accelerated, many library systems have begun to collaborate, share content, and work together. This area is ripe for further positive change. However, the certification process is still entirely paper-based and requires many "touches" by local, regional, and state individuals.

The learning management system should meet, and exceed, the professional development needs of library professionals and library board trustees throughout Wisconsin. This system would serve as a repository of online professional development content (streaming courses, webinars, etc.) while also providing library staff and trustees with the ability to locate nearby in-person professional development activities through incorporation of an interactive event calendar. It is further envisioned that this portal will include the capability for library professionals to manage their own certification status online, while providing DPI the capability to exercise their statutory oversight obligation in a manner that is both efficient and effective.

Goals of the Recommendation

The goals of this recommendation are to:
- Furnish library professionals with a more effective means of discovering and obtaining content and instruction that is directly applicable to their professional development.

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- Eliminate the currently paper-based process of certification, in favor of a user-friendly online system to streamline the process of applying for certification, submitting and tracking contact hours, validating contact hours, and granting of certification (or recertification) status.

- Foster collaboration between agencies that offer professional development opportunities through implementation of a curated calendar of events and opportunities across the entire state.

Value Proposition

Creation of a web-based CE Portal based upon modern technologies and best practices would have a number of positive impacts:
- Public librarian certification requirements in Wisconsin date back to as early as 1921. Modernizing this process would benefit our state by ensuring the presence of highly qualified leaders in the profession, while leveraging technology to reduce general administrative overhead (COLAND Strategic Direction #5).

- A well-curated learning management platform would significantly reduce the valuable time required to locate professional development opportunities. This, in turn, would result in more time spent providing direct service to the public (COLAND Strategic Direction #2).

- Current practice is for each regional library system to provide opportunities for professional development to member libraries. Therefore, quality and frequency vary greatly. Creation of a single online tool geared toward professional development for librarians and library trustees would reduce duplication of effort and spur collaboration while simultaneously improving equity of access to many high-quality professional development opportunities on a statewide basis (COLAND Strategic Direction #5).

Suggested Implementation process

- Appoint a small implementation team of well-qualified individuals.
- Consider hiring a project manager to drive the project, manage the implementation team, and serve as a bridge between stakeholder groups.
- Review any specifications for the platform that have been created to date, and create an authoritative list.
- Compare specifications with existing learning management system vendor capabilities.
- Explore potential cost, quality and feasibility of a tool developed "in house" by DPI or Department of Administration (DOA) personnel.
- Utilize platform specifications document to craft a Request for Pricing (RFP) or Request for Information (RFI). Distribute the request to qualified learning management system vendors and/or software development agencies.

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- Create a process to evaluate software options, including:
    - Ability to meet content requirements and goals of this PLSR recommendation
    - User Experience
    - Administration requirements (back-end management)
    - Cost

Note: Any procurement process should emphasize results over cost. For example: selection of a platform simply because it complies with DPI procurement guidelines and is low-cost would not be appropriate and should be avoided through process design.

Measuring Success

- Workflow analysis of certification process
- A general survey should be completed to assess levels of satisfaction among library professionals with respect to access to (and quality of) professional development resources. This survey could also be done "before" and "after" for purposes of comparison.
- An analysis should be conducted by an external party to assess levels of collaboration between regional library systems.

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Appendix A: Library Systems in Wisconsin: A Brief History

Wisconsin's library system law, providing funding for coordinated regional library services, officially went into effect in 1971 when Senate Bill 47 was signed into law. The creation of public library systems fostered the establishment of a strong network of resource sharing and mutually beneficial interdependence. The actual creation and development of public library systems in Wisconsin was a voluntary and gradual process. No county or public library is required to be a member of a library system; yet, as of this writing, all of Wisconsin's 72 counties and over 380 public libraries are library system members. Wisconsin's seventeen public library systems developed in distinct ways in response to the needs of their member libraries and area residents. The systems have continued to evolve as changes in society, resources, and technologies create new demands and opportunities.

The seeds for regional library services had been planted years earlier and several regional services had coordinated cooperative services. In 1956, the American Library Association published *Public Library Service: a Guide to Evaluation with Minimum Standards,* which introduced the library system concept. That same year the United States Congress enacted the Library Services Act (LSA) to provide federal funding for extending and improving public library service to rural communities. The Wisconsin Library Association and the Wisconsin Free Library Commission submitted a plan for LSA funding. Also in 1956, twenty-five public libraries joined together to form the Southwest Association of Public Libraries. In 1959 they obtained LSA funding to establish an ordering and processing center serving five counties, the predecessor to the Southwest Wisconsin Library System. Also that year, a regional library system was established in northwest Wisconsin serving five counties, the precursor of the Northern Waters Library Service.

In 1963, the Free Library Commission, WLA and the Wisconsin Library Trustees Association adopted *A Design for Public Library Development in Wisconsin: Standards for Measuring Progress.* The following statement from that document helps to convey the vision
"Simply stated, the library system concept means that only by working together, sharing services and materials, can libraries meet the full needs of their users. Each public library, whatever its size, is an important link in a system of libraries joined together either formally or informally."
That document described a shared vision of public library systems that ultimately led to the development and adoption of 1971 Senate Bill 47 through a series of events:

- In 1965 the Wisconsin Library Commission was folded into DPI and became the Division for Library Services.

- In 1966 WLA approved a legislative study program calling for legislation to "implement the library system concept and interlibrary cooperation in Wisconsin.

- In 1968 the Library Development and Legislative Committee (LD&L) of WLA developed a report for the legislature.

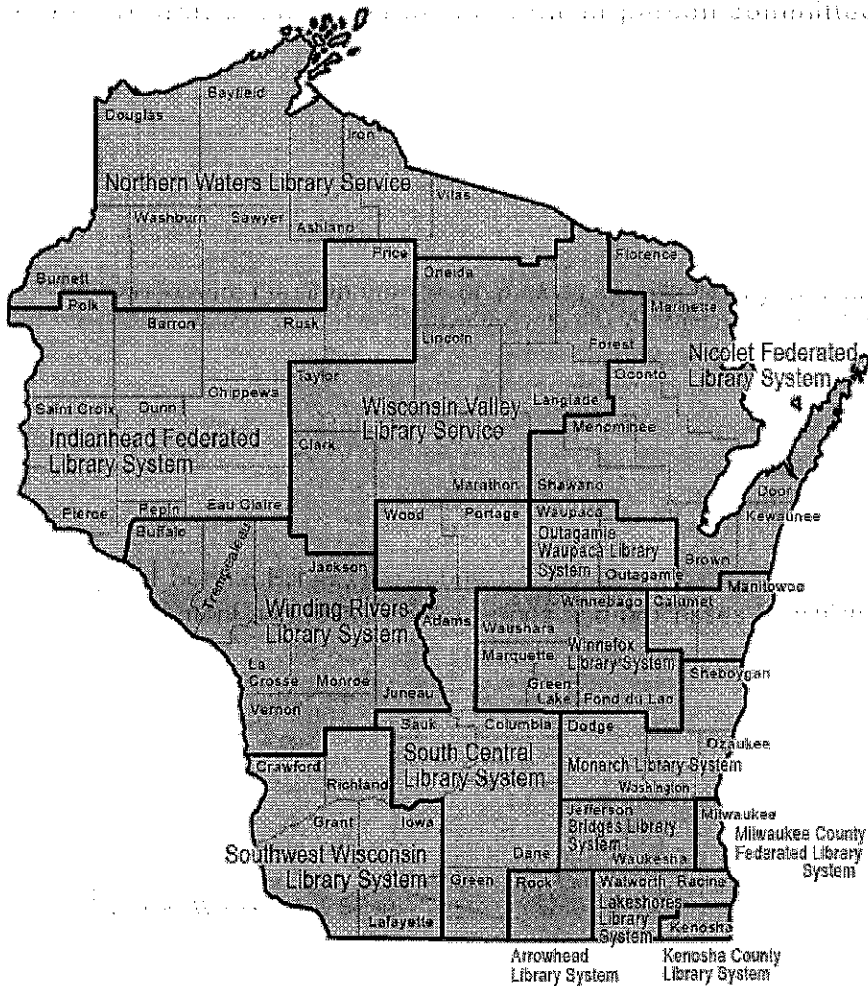- In 1969 that report was introduced as Senate Bill 363.

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* The Senate Education Committee recommended the bill be revised, and

* In 1971 Senate Bill 47 was introduced and, after extensive legislative efforts by WLA, was passed by both houses. The bill included the following declaration:

> *"Recognizing the importance of making quality library resources and services readily available to all of the citizens of Wisconsin, the legislature, through this act, seeks to modernize library laws for public and school libraries, to promote development and improvement of public libraries through library systems and to provide maximum opportunities for cooperation among all types of libraries in order to encourage the most effective use of the library resources in this state."*

Since the passage of Senate Bill 47, a number of subsequent components of legislation have been passed to supplement and refine the guidelines and processes by which library systems operate. As of this writing, the following map represents the sixteen regional library systems in Wisconsin:

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Appendix B: Funding Strategies and Sources

The PLSR project has not only produced the recommendations in this report, but a series of deep dives (in the form of work group reports) into each individual service provided regional library systems. Taken as a whole, it is abundantly clear there are a variety of opportunities to improve access to services, and to improve the effectiveness of the services themselves. In order to move forward without significant disruption to libraries and patrons, new service infrastructure must be put in place in parallel with the old. Realistically, this will require additional sources of funding beyond what is currently available in the form of state aid to regional systems.

Local library contributions - libraries paying into services

Through the process of recommendation development, a number of common themes have emerged in regard to potential sources of additional funding to support implementation:

- In-Kind resources contributed by state agencies. The Department of Public Instruction, Department of Administration and others have significant staff assets, though it is understood that resources are finite and priorities are many.   These agencies could incorporate implementation of PLSR recommendations into their planning processes, so as to allow. Examples of in-kind resources might include:

    - User experience (UX) or design consulting expertise in regard to a library staff continuing education portal and validation tracker;

    - Direct development of software or web applications related to a library staff continuing education portal and validation tracker or ILS discovery layer;

    - Web hosting for a library staff continuing education portal and validation tracker;

    - Administrative coordination of ongoing initiatives related to moving the PLSR recommendations forward.

- Library Services and Technology Act funding derived from the "Grants to States" program. Through this program, Wisconsin is allocated roughly 2.8 million dollars. Expenditures of these dollars are prioritized by the Department of Public Instruction. Future planning by the division could incorporate funding to support implementation of PLSR recommendations. Specific examples may include:

    - A grant category to support a regional delivery pilot build-out;

    - A grant category to support development of a state-scale discovery layer;

    - A grant category to incentivize development and implementation of system best-practices.

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- <u>Library Services and Technology Act funding derived from other specific grant programs.</u> A number of non-block grant programs exist, including the "Laura Bush 21st Century Librarian" and "National Leadership Grant for Libraries" programs. Other programs may be established in the future. These programs may provide an opportunity to acquire funding for components of the recommendations that require more in-depth work. Examples may include:

    - Grant applications designed to fund additional project management capacity.

- <u>Funding related to the Wisconsin Information System for Education (WISE) program.</u> The WISE program is focused on creating - and coordinating - the services and infrastructure required to improve how we use data to learn and educate. This program has recently been broadened to include libraries. It is possible that WISE-related funding (or other assets) may be allocated to implementing certain recommendations. Examples may include:

    - Funding the development of a uniform set of ILS communication messages;

    - Using the list of ILS communication messages to build a universal ILS communicator tool to aid regional delivery pilots;

    - Working with ILS vendors who do business in Wisconsin to ensure compliance with uniform communication specifications;

    - Funding and coordinating a process of product evaluation.

- <u>Increase in state aids to the regional library systems.</u> Annual state aid funding is allocated according to state statutes and the administrative code. However, the library community could establish future legislative priorities which include requesting a modest increase in state aid which the existing systems would use to collectively fund specific implementation components of PLSR recommendations. Examples may include:

    - Funding for the development of a universal ILS communicator tool to aid in regional delivery pilots;

    - Funding designed to ease transition to any changes to a modified funding allocation formula;

    - Any components of the recommendations or opportunities identified through the PLSR process with strong collaborative potential.

This document should be read as an initial consideration of potential funding sources. It is possible other sources may exist

WiLS
Expanding Possibilities through Collaboration

2018-19 MCFLS Strategic Planning Activities Timeline

Activity	When	Information
Summary of the end status/results of the last strategic plan implementation	November 16, 2018	Review progress summaries documented during the last plan implementation to create a summary document.
1st survey to member libraries	December 3 to December 14, 2018	To gather information and gain understanding of service priorities member libraries have to serve their communities
2nd survey to members/board/staff	January 7 to January 23, 2019	To gather information and gain understanding of impact of last system plan and where the system can and should help libraries achieve their service priorities
Plan development all-day meeting	Week of February 25, 2019	All-day meeting of member library directors, MCFLS Board members, and MCFLS staff to identify strategic issues and develop a strategic plan framework. Agenda packet to be shared week of February 11, 2019
Staff implementation meeting	Week of March 18, 2019	3-hour meeting of MCFLS staff to identify implementation, assessment, and evaluation strategies and plans. Staff will receive an agenda packet the week of March 11, 2019
Write the strategic plan	April 8	WiLS completes first draft
	April 11 to April 26, 2019	Input from stakeholders on the first draft. Board meeting on April 15th and LDAC on April 18th
	April 29 to May 10, 2019	WiLS and MCFLS Director collaborate to complete final draft
	May 20	Submit to board for approval

MCFLS Strategic Planning
Attachment C (12/06/18)
Page 1 of 1

Member Library Annual Report—pre-filled sections

Section II. Library Collection
1. Books in print
1b. Books in print added during year
2. Electronic books (e-books) (Overdrive, hoopla and EBSCO—Cloud libraries must add the total)
3. Audio Materials
3b. Audio added during year
4. Electronic audio materials
5. Video materials
5b. Video added during year
6. Electronic video materials (downloadable) Overdrive and hoopla—libraries with additional must add
7. Other materials owned
8b. Databases provided by system (0)

Section III. Library Services
1a. Total annual circulation
1b. Circulation of children's materials
2a Items loaned (provided to)
2b. Items received (received from)
3a. Registered borrowers resident
3b Registered borrowers nonresident
9a. Uses of e-books by users of your library
9b. Uses of e-audio by users of your library
9c. Uses of e-video by users of your library

Section V. Library Operating Revenue
3a. Public Library System State Funds and amount—reciprocal borrowing, resource library
5. Contract income (West Milwaukee) and amount

Section VI. Library Operating Expenditures
4. Contracts for Services—MCFLS Automation and Technical Support—and amount

Section XI. Public Library Loans of Material to Nonresidents
1. Total nonresident circulation
2a. Home county circulation to those with a library
2b. Home county circulation to those without a library
3a. Other system county circulation to those with a library (0)
3b. Other system county circulation to those without a library (0)
4a. Nonsystem adjacent county circulation to those with a library
4b. Nonsystem adjacent county circulation to those without a library (0)
5. Circulation to all other state residents
6. Circulation to users from out of state

The Inclusive Services Assessment and Guide for Wisconsin Public Libraries

Produced by the Public Library Development Team

Participants in the inaugural 2018 Inclusive Services Institute developed this self-assessment tool and guide so that libraries are better able to evaluate the inclusivity of their spaces, programming, services, and administrative operations.

WISCONSIN DEPARTMENT OF PUBLIC INSTRUCTION
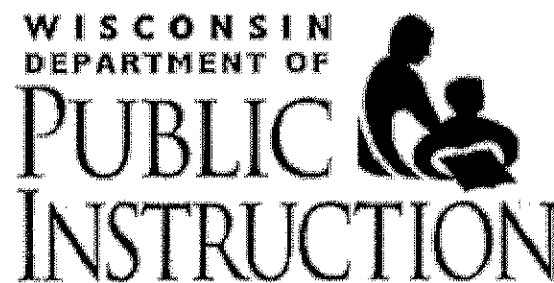
Wisconsin Department of Public Instruction
Tony Evers, PhD, State Superintendent
Madison, WI

Table of Contents

Inclusive Services in Wisconsin Public Libraries

The Inclusive Services Statement (link)

Wisconsin public libraries are places where everyone should be safe, welcomed, and respected in experiences such as (but not limited to):

- Arrival at the building (transportation, physical accessibility, signage, hours of service, greetings by library staff)
- Intersections with library policies (getting a library card, using a computer, paying a fine)
- Perusal, use, and request of library materials (navigating the aisles, accessing Wi-Fi, individual privacy, diversity of collection)
- Participation in library-sponsored or library-located events (marketing of events, time and location, transportation, registration, room set-up, novice-friendly vs. designed for frequent users)
- Interactions with library staff (body language, tone, diversity of library staff, proactive/reactive engagement)
- Passive and virtual interactions through library signage, webpages, displays, and marketing (readability, tone, diversity, accommodations).

The Division of Libraries and Technology interprets Statute 43.24(2)(k) "Promotion and facilitation of library service to users with special needs" to encompass inclusive services. Inclusive library services are holistic, spanning library policies, collections, space, and services. Inclusive services reflect equity and accessibility for all members of the community. Diverse communities are strengthened by libraries that intentionally develop and deliver services to individuals or groups for whom accessing and using the library is difficult, limited, or minimized.

The library director and board of trustees should provide awareness and leadership concerning the concept and implementation of inclusive services to library staff and stakeholders. Regional library systems should both support member libraries in matters of compliance, and communicate such efforts through annual system plans and reports. The state library agency will provide consulting and collaborate with libraries and systems regarding inclusive services. Wisconsin public libraries serve everyone, and it is the duty of everyone in the service of Wisconsin public libraries to foster inclusivity.

The practice of providing inclusive services requires continuous reflection and ongoing dialog with and between library administration, staff, and members of the community, with particular emphasis on including the voices of those who are underserved, underrepresented, and underrecognized within the community. Efforts should respond to the assets and needs of non-library users and users alike. Attention to actual, versus perceived, assets and needs is paramount; i.e., a barrier perceived by library staff may or may not be an actual barrier experienced by the user.

On a concrete level, inclusive services should be visibly incorporated into all library services. The concept that libraries are for everyone should be evident through every point of access or interaction with the library. A person's race, ethnicity, age, citizenship, literacy level, ability, family structure, income level, health status, gender identity, sexuality, style of dress, familiarity with public libraries - or any other dimension of identity - should neither negatively influence nor interfere with access to library services.

When libraries honor the full diversity of their communities, communities thrive. First and foremost, inclusive library services should be developed locally with and for all community members. Wisconsin public library systems and state

library staff should facilitate coordinated regional and statewide inclusive services training and consulting. Our common goal is to improve life and learning opportunities for all Wisconsin residents.

The Inclusive Services Institute

The Inclusive Services Institute was a professional development and workgroup opportunity for Wisconsin public library and regional system staff committed to making Wisconsin libraries more inclusive to all community members and potential library users. The Institute offered reflective learning experiences on topics of equity and social justice. Participants worked on small teams to develop statewide resources. The Inclusive Services Statement from the Division of Libraries and Technology provides the foundation for the Institute content and workgroup efforts.

The Inclusive Services Institute is funded by a Library Services and Technology Act (LSTA) grant from the Institute for Museum and Library Services administered by the Public Library Development Team at the Wisconsin Department of Public Instruction.

Authors

We thank the 2018 Inclusive Services Cohort for their time, talent, and commitment in developing the Inclusive Services Assessment and Guide.

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- Mark Jochem, New Berlin Public Library, Bridges Library System
- Samantha Johnson, Augusta Memorial Public Library, IFLS Library System
- Susan Younger, Wautoma Public Library, Winnefox Library System
- Emilie Braunel, Plum Lake Public Library, Northern Waters Library Service
- Bobbie Kuehn, Brown County Library, Nicolet Federated Library System
- Laurie Ollhoff, T.B. Scott Free Library, Wisconsin Valley Library Service
- Holly K. Smith, Monarch Library System
- René Bue, Hedberg Public Library, Arrowhead Library System
- Shauna Koszegi, Sun Prairie Public Library, South Central Library System
- Lisa Rivers, Southwest Library, Kenosha County Library System
- Elizabeth Timmins, Muehl Public Library, Outagamie Waupaca Library System

2018 Institute Leaders:

- Shawn Brommer, South Central Library System
- Leah Langby, IFLS Library System
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Introduction

The Inclusive Services Assessment and Guide was designed by Wisconsin public library and library system staff for Wisconsin public library directors, staff, and boards with the intent to foster inclusive library environments where everyone is safe, welcomed, and respected. This resource was developed to support libraries in implementing the Inclusive Services Statement. In addition, this resource intentionally complements the 2018 WI Public Library Standards.

How to Use the Inclusive Services Assessment and Guide

This resource was designed to be used by individuals and groups as an ongoing reflection tool. The checklist and supporting resources are meant to help libraries evaluate current services as well as plan for the future.

The checklist is organized by areas of library service identified in the WI Public Library Standards. Each section provides a straightforward checklist that can be answered with Yes, No, In Progress, or Not Applicable. These responses are defined as follows:
- Yes - This response indicates that the library is currently executing the checklist statement
    - Example - "Yes; the library displays pictograms at the entrances of the restrooms"
- No - This response indicates that the library is NOT currently executing the checklist statement
    - Example - "No; the library does not display pictograms at the entrances of the restrooms"
- In Progress - This response indicates that the library is currently developing the checklist statement
    - Example - "In Progress; the library is in the process of installing pictograms at the entrances of the restrooms"
- Not Applicable - This response indicates that the checklist statement is factually irrelevant to the library
    - Example - "Not Applicable; The library does not have public restrooms because it is a bookmobile."

Scoreable responses to each checklist will provide a snapshot of current levels of inclusion. Supporting materials, such as the reflection worksheet (available now) and next-step suggestions (coming later), offer ways for individual libraries to evaluate existing assets and opportunities for growth and change.

The comprehensive nature of the considerations asked within the Inclusive Services Assessment and Guide is overwhelming. All communities are unique and therefore each library will use this guide differently. This tool might be used as an annual reflection, or utilized more often. The tool might be used as a whole, or by prioritizing sections. First and foremost, the Inclusive Services Assessment and Guide is meant to assist the library in better understanding how it considers inclusion as an institution. Each library needs to determine how to connect with the tool and process the reflections it provokes. In addition, each library will determine how to best share its efforts.

In developing the Inclusive Services Assessment and Guide, attention was given to language and sensitivities of groups and individuals. Terms and phrasing used in this document will likely need to be updated in response to evolution of language and society. A glossary will be provided in the final version of this resource.

Beta Version of the Inclusive Services Assessment and Guide

This initial version, the first of its kind, was designed to have a period of response from the public library professional community. Input on every aspect of the document is welcome through December 31, 2018 and can be shared by individuals using this Google Form: https://goo.gl/forms/9se1jZagoaSMAiuj1.

Who Is Responsible? Service Providers and Policy

The checklist is organized by areas of library service identified in the WI Public Library Standards. Each section provides a straightforward checklist that can be answered with Yes, No, In Progress, or Not Applicable. Use the Scoring Rubric to score each section. See "How to Use the Inclusive Services Assessment and Guide" for examples.

Governance

Y N IP NA 1. Does the Library Board reflect the demographics of the community?

Y N IP NA 2. Is the need for diversity among Library Board trustees communicated to the municipal governing body who makes trustee appointments (mayor/city council, village president/board, county executive, etc)?

Y N IP NA 3. Are the bylaws available in the languages spoken by the community, including braille if necessary?

Y N IP NA 4. Are the bylaws written in gender-neutral language?

Y N IP NA 5. Do the bylaws have language on equity and inclusion being foundational to the purpose of the library?

Y N IP NA 6. Does the library regularly review all policies to determine if they are creating unnecessary barriers?

Y N IP NA 7. Are policies regularly updated to reflect the needs of the community the library serves?

Y N IP NA 8. Are the policies accessible to all members of the community, including language spoken, reading ability, etc.?

Y N IP NA 9. Do the policies refer to patrons in a respectful, gender-neutral, unbiased way?

Y N IP NA 10. Does the library offer meeting space at the library for diverse community group meetings to take place?

Y N IP NA 11. Does the library budget reflect the values of the community?

Y N IP NA 12. When creating or revising the Library Director position description, are members of the community who reflect the population demographics included?

Y N IP NA 13. Is inclusion reflected in the Library Director position description (e.g. created with input from the Hmong community)?

Y N IP NA 14. Is the Library Director position description gender-neutral?

Y N IP NA 15. Is the Library Director position description translated into the languages spoken by the community, including Braille if necessary?

Y N IP NA 16. Is community demographic information included in the Library Director job advertisement?

Y N IP NA 17. Does the Library Director job advertisement include a description of the ADA-accessibility of the library facility/facilities?

Y N IP NA 18. Do Library Director candidates have an opportunity to meet community members who reflect the population demographics?

Y N IP NA 19. Are members of the community included in the decision-making process of choosing the new Library Director?

Y N IP NA 20. Upon hire, are there opportunities for the new Director to meet members of the community not just at the library, but through invitations to events or places of the community's choosing? (e.g. a PrideFest celebration, a Hindu service, the local Irish bar, a rehab center, etc.)

Y N IP NA 21. Does the Library Director's evaluation tool ask how they interact with members and organizations reflecting the demographics of the community?

Y N IP NA 22. Does the evaluation instrument ask how the Library Director is interacting with members and organizations reflecting the demographics of the community?

Y N IP NA 23. Are salaries equitable for all staff?

Y N IP NA 24. Are part-time staff salaries equitable with salaries for those working full-time in similar positions?

Y N IP NA 25. When the Library Board begins to develop its strategic plan, are community members that reflect the demographics of the community invited to participate?

Y N IP NA 26. Are inclusive services goals and objectives included in the strategic plan to meet the community's needs?

Administration

Y N IP NA 1. Has the Library Director ensured that the Inclusive Services Statement is shared with new board members when they are appointed to the Library Board?

Y N IP NA 2. Do written procedures include the library's primary commitment to equitable service to all patrons?

Y N IP NA 3. Does the Library Director make the Library Board and/or Trustees aware of upcoming library-related continuing education related to inclusive services?

Y N IP NA 4. Does the Library Director present updates to the Library Board of services, programs, and issues related to inclusive services?

Y N IP NA 5. Has the Library Director studied and shared the impact of fines on low-income families with the Board?

Y N IP NA 6.   Has the Library Director had an open discussion with the library board, management team and staff to be assured that they understand the importance of funding for diverse trainings, programs and collections?

Y N IP NA 7.   Does the Library Director actively engage with diverse community groups?

Y N IP NA 8.   Does the Library Director attend community meetings that address the needs of diverse members of the community?

Y N IP NA 9.   Does the Library Director have opportunities to participate in professional activities such as continuing education opportunities?

Y N IP NA 10.   Does the Library Director integrate inclusivity practices into recruiting, screening, hiring, and retaining staff?

Y N IP NA 11.   Is the Library Director aware of professional development opportunities in relation to inclusive services for self and staff?

Y N IP NA 12.   Does the Library Director encourage active staff participation in their library system's inclusivity programming?

Y N IP NA 13.   Does the Library Director promote inclusive services planning at the county and system level?

Y N IP NA 14.   Does the Library Director consider inclusive services in the technology plan?

Staffing

Y N IP NA 1.   Do library staff have a general understanding of basic inclusivity standards?

Y N IP NA 2.   Are all library staff able to explain library policies to the public?

Y N IP NA 3.   Are all library staff well trained in procedures required by their positions?

Y N IP NA 4.   Do library staff project an image of competence and courtesy?

Y N IP NA 5.   Do library staff communicate and work effectively with other staff?

Y N IP NA 6.   Do library staff evaluate and measure the effectiveness of library programs and services?

Y N IP NA 7.   Do library staff assist in library planning efforts?

Y N IP NA 8.   Do library staff use current and emerging technologies?

Y N IP NA 9.   Do library staff participate in the political and social structure of the community?

Y N IP NA 10.   Are all library staff trained in emergency protocols and procedures?

Y N IP NA 11.   Are all library staff, volunteers, and trustees trained in patron privacy and confidentiality?

What the Library Has to Offer

The checklist is organized by areas of library service identified in the WI Public Library Standards. Each section provides a straightforward checklist that can be answered with Yes, No, In Progress, or Not Applicable. Use the Scoring Rubric to score each section. See "How to Use the Inclusive Services Assessment and Guide" for examples.

Collections

A person's ethnicity, age, citizenship, immigration status, literacy or education level, ability, family structure, income level, LGBTQ/gender identity or expression, sexuality, housing status, neurodiversity, style of dress, military status, or any other dimension of identity should neither negatively influence nor interfere with access to the library collection.

This checklist applies to all collection areas of the library.

Y N IP NA 1. Does the collection development policy have a statement about inclusion?

Y N IP NA 2. Does the collection reflect the community's tastes, beliefs, or attitudes?

Y N IP NA 3. Does the collection challenge the community's tastes, beliefs, or attitudes?

Y N IP NA 4. Is the community involved in building and advising on the content of the collection?

Y N IP NA 5. Are multiple sources, representative of diverse communities, consulted while building the collection?

Y N IP NA 6. Does the collection include storylines and characters by and from diverse groups (racial, ethnic, gender identity/expression, sexual identity, disability, veteran status, education level, etc.)?

Y N IP NA 7. Does the collection include accurate, respectful, and current information by and about diverse groups as fact, characters in a storyline, or settings and contexts? (racial, ethnic, gender identity/expression, sexual identity, disability, veteran status, education level, etc.)

Y N IP NA 8. Does the collection include resources for furthering education (GED, ACT/SAT test prep, etc.)?

Y N IP NA 9. Does the collection include titles for self-improvement in skills?

Y N IP NA 10. Does the collection provide materials for people of varied education levels and literacy/English language skills?

Y N IP NA 11. Does the library subscribe to or offer materials for language learning?

Y N IP NA 12. Is the collection in multiple formats [i.e. books, audio books, large print, graphic formats, materials in braille, braille and print combination, narrated TV programs and movies, tangible materials (toys, tools, and sensory items), and audiovisual]?

Y N IP NA 13. Is the collection accessible to people with sensory, ambulatory, social, emotional, and intellectual differences?

Y N IP NA 14. Are databases and other e-resources accessible through alternative means (i.e. screen readers, magnification, closed captioning, and assistive devices)?

Y N IP NA 15. Does the collection contain items in languages other than English?

Y N IP NA 16. Does the collection include titles for "hi-low" readers; such as adults who read at a middle school level?

Y N IP NA 17. Does the library offer various audiobook formats, such as CDs, downloadable audiobooks, and eBooks?

Y N IP NA 18. Does the library offer audio-described movies and television programs (formatted to include a narration of events for which there isn't a dialogue) on DVD?

Programming

Programming may include policies, planning, and execution of educational, recreational, informational and cultural programs.

Y N IP YA 1.   Does the library have a written programming policy?

Y N IP YA 2.   Does the programming policy include a diversity or inclusivity statement?

Y N IP YA 3.   Does the library offer programming at different times of day and various days of the week, including nights and weekends?

Y N IP YA 4.   Does the library offer programming in languages other than English?

Y N IP YA 5.   Are people able to participate in library programming whether or not they have a library card?

Y N IP YA 6.   Does the library include an inclusivity statement on promotional materials?

Y N IP YA 7.   Does the library include a diverse group of community members in the development of programs?

Y N IP YA 8.   Does the library plan programs based on community needs and interest?

Y N IP YA 9.   Does the library collaborate with established community organizations when planning and promoting programs?

Y N IP YA 10.   Does the library provide ADA accommodations for presenters and program attendees?

Y N IP YA 11.   Does the library provide a clear path for persons to request ADA accommodations that will enable them to participate fully in library programs?

Y N IP YA 12.   Are there multiple avenues available for program attendees to provide feedback?

Y N IP YA 13.   Does the library offer programming for the diverse audiences listed in the introduction?

Y N IP YA 14.   Does the library contract with performers, authors, and presenters from the diverse audiences listed in the introduction?

Y N IP YA 15.   Does the library provide traditional and non-traditional creative programming to attract and meet the needs of non-English speaking persons in the community?

Y N IP YA 16.   Does the library offer free programs related to work and life skills development, as well as cultural and recreational presentations through local partnerships, volunteers, or contracted performers for people of all ages?

Y N IP YA 17.   Are there free classes for people who want to learn and improve their English or literacy skills?

Y N IP YA 18.   Does the library offer programs that celebrate a wide variety of heritages and cultural events?

Services

Services may include physical resources/equipment that allow individuals to make use of the library or they may be the intrinsic way that staff interact with patrons.

Y N IP NA 1.   Does the library use programs, literature, and publicity in creative ways and in a variety of settings to attract those for whom libraries are not part of their life experience?

Y N IP NA 2.   Does the library provide programs and services about gender identity, gender expression, or sexual orientation?

Y N IP NA 3.   Does the library avoid asking about gender on forms, or dividing activities based on gender?

Y N IP NA 4.   Does the library create pathfinders, subject guides or reader's advisory bookmarks related to topics of interest to diverse communities (LGBTQ, immigrants, neurodiverse people, etc.)?

Y N IP NA 5.   Do library displays regularly include materials by and about diverse groups (people of color, LGBTQ, people with disabilities, etc.)?

Y N IP NA 6.   Does the library offer discreet information, such as shortcuts to local services on computer desktops, about PTSD and other sensitive topics?

Y N IP NA 7.   Are resources available for all community members?

Y N IP NA 8.   Does the library provide visual schedules of library events or due dates of materials?

Y N IP NA 9.   Does the library provide visual timers for program or computer scheduling?

Y N IP NA 10.   Does the library provide touch screen devices for internet or communication purposes?

Y N IP NA 11.   Does the library provide adaptive technologies, such as screen readers, text to speech software, adaptive mice, and magnifiers?

Y N IP NA 12.   Does the library provide fidgets (small manipulatives, such as soft balls, that fit safely and comfortably in the hand) for neurodiverse patrons?

Y N IP NA 13.   Does the library provide sensory storytimes or programs for children?

Y N IP NA 14.   Does the library provide inclusive seating options, such as the option to sit at the front of the room, space for wheelchairs, or space to stand, during library programs and activities?

Y N IP NA 15.   Does the library offer personal FM or other listening devices during presentations?

Y N IP NA 16.   Does the library help non-English speaking immigrants understand and interact with the culture, government, and educational system of the United States, via resources and services offered?

Y N IP NA 17.   Is there information on free legal assistance and financial counseling for people interested in becoming US Citizens and information on free legal services for immigrants?

Y N IP NA 18.   Do programs and services reflect the local immigrant community needs and offer a variety of print materials (books, magazines, newspapers), as well as media (CDs, DVDs) in the language of the immigrant community for all ages, and online resources?

Y N IP NA 19.   Are there programs and resources readily available for teen parents?

Y N IP NA 20.   Are there multigenerational family literacy programs for children and their parents, grandparents, and caregivers?

Y N IP NA 21.   Are programs and materials presented in both English and other prevailing languages within the community?

Y N IP NA 22.   Is there a community space/meeting room that all groups are welcomed to reserve?

Y N IP NA 23.   Are there Advisory Boards to allow the library to better understand the needs and interests of various populations (teens, seniors, underrepresented populations, etc.)?

Where the Interactions Take Place

The checklist is organized by areas of library service identified in the WI Public Library Standards. Each section provides a straightforward checklist that can be answered with Yes, No, In Progress, or Not Applicable. Use the Scoring Rubric to score each section. See "How to Use the Inclusive Services Assessment and Guide" for examples.

Facility

Outdoor Spaces

Y　N　IP　NA　1.　Does public library parking meet the requirements of the Americans with Disabilities Act (ADA)?

Y　N　IP　NA　2.　Is the parking area well lit?

Y　N　IP　NA　3.　Is library parking free?

Y　N　IP　NA　4.　Is parking convenient to library's entrances?

Y　N　IP　NA　5.　Are bicycle racks convenient to the building entrances?

Y　N　IP　NA　6.　Does the book return meet the requirements of the Americans with Disabilities Act (ADA)?

Y　N　IP　NA　7.　Is the book return accessible 24/7?

Y　N　IP　NA　8.　Does the book return accommodate access by cars and pedestrians, including pedestrians using wheelchairs?

Y　N　IP　NA　9.　Does the outdoor signage meet the requirements of the Americans with Disabilities Act (ADA)?

Y　N　IP　NA　10.　Does the library have wayfinder signs with pictograms?

Y　N　IP　NA　11.　Is the entrance signage in languages spoken in the community, as well as pictograms?

Y　N　IP　NA　12.　Do the library walkways meet the requirements of the Americans with Disabilities Act (ADA)?

Y　N　IP　NA　13.　Are walkway surfaces safe and uniform?

Y　N　IP　NA　14.　Are the library's outdoor spaces easily accessible, and if there is outdoor equipment (picnic tables, playground equipment) is it wheelchair accessible?

Y　N　IP　NA　15.　If there are signs/activities/etc. for outdoor spaces, are they welcoming to all?

Y　N　IP　NA　16.　Do all entrances and exits meet the requirements of the Americans with Disabilities Act (ADA)?

Y　N　IP　NA　17.　Does the library entrance have an electronic door opener?

Y　N　IP　NA　18.　Do all emergency exits meet state/municipal building codes?

Y　N　IP　NA　19.　Do all entrance and interior doors have adequate clearance?

Y　N　IP　NA　20.　Are the security gates wide enough to accommodate a wheelchair?

Y　N　IP　NA　21.　Does the entryway have level, clear and slip-resistant flooring?

Indoor Spaces (General)

Y　N　IP　NA　1.　Is there an elevator when the facility is on multiple levels?

Y　N　IP　NA　2.　Does the elevator meet ADA requirements and state/municipal building codes?

Y　N　IP　NA　3.　Are elevator signs and controls in multiple languages, including Braille?

Y　N　IP　NA　4.　Does the elevator have auditory signals?

Y N IP NA 5. Does emergency/safety equipment meet ADA requirements and state/municipal building codes?

Y N IP NA 6. Is there a visual indicator for emergency alarms?

Y N IP NA 7. Are points of service easily identified?

Y N IP NA 8. Is the equipment in public spaces accessible?

Y N IP NA 9. Does the library provide a variety of options for quiet study and privacy?

Y N IP NA 10. Are floors carpeted (rather than hard floors) to reduce noise from moving chairs/furniture?

Y N IP NA 11. Are carpets appropriately secured to the floor?

Y N IP NA 12. Is the library free of obstructions for those with mobility aids?

Y N IP NA 13. Are all levels of the library connected via an accessible route of travel?

Y N IP NA 14. Are sight lines adequate throughout?

Y N IP NA 15. Are there adequate outlets?

Y N IP NA 16. Are youth spaces designed to be considerate of size and usage?

Y N IP NA 17. Does the library provide allocated space for people who are nursing/pumping?

Y N IP NA 18. Are there measures in place for patrons and staff sensitive to overstimulation?

Y N IP NA 19. Are there measures in place for patrons and staff sensitive to scents?

Y N IP NA 20. Is there space that can be used for prayer or meditation?

Y N IP NA 21. Is it clear that service animals are welcome in the library?

Y N IP NA 22. Are gallery spaces and display cases accessible?

Y N IP NA 23. Is there adequate lighting throughout the library space?

Y N IP NA 24. Is there adequate seating throughout the library space?

Y N IP NA 25. Are the service desks the appropriate height for adults, children, and wheelchair access?

Y N IP NA 26. Are there assistive technologies available?

Y N IP NA 27. Is there self-checkout, accessible by wheelchair?

Y N IP NA 28. If there is a self-checkout, does it display instructions in multiple languages?

Y N IP NA 29. Is seating available for customer/staff consultation?

Y N IP NA 30. Is adequate space allowed for customer use of reference materials?

Y N IP NA 31. Do the service desks provide separate or acoustically isolated spaces for the following services: interlibrary loan, database searches, general information, customer interviews, photocopiers?

Y N IP NA 32. Are there technologies available to make it easier to hear in meeting/event spaces (eg: microphones, sound systems, hearing loops)?

Y N IP NA 33. Are assistive technologies available in meeting/event spaces?

Y N IP NA 34. Is there adequate and adjustable lighting in meeting/event spaces?

Y N IP NA 35. Is there comfortable adult seating for use while adults are sharing books with children?

Y N IP NA 36. Is the floor a single level to allow for flexibility in programming and accessibility, as well as to avoid injuries?

Y N IP NA 37. Has sufficient space been allowed for easy access by children if materials are checked out or returned at the children's desk?

Y N IP NA 38. If children's and adult circulation counters are separated, is there lower counter space set aside for children, visibly marked by large graphics?

Y N IP NA 39. Although there should be imaginative pieces of furniture, cheerful colors, etc. is there a space for individuals who require less stimuli?

Y N IP NA 40.   Is there a quiet corner where children can retreat from the program without leaving the room?

Y N IP NA 41.   Is there a separate programming area out of the traffic flow?

Y N IP NA 42.   Is there secure and adequate space to store teen gear such as skateboards and backpacks?

Y N IP NA 43.   Are there physical resources available to use when the library is closed (wifi, drinking fountain, outlets, public phone, restroom)?

Meeting Room/Event Space

Y N IP NA 1.   Is the meeting room entry close to the main entrance? If not, is the path clear for ease of access?

Y N IP NA 2.   Are there window coverings in the meeting room/event space?

Y N IP NA 3.   Can the meeting room area be closed off from the remainder of the library? If not, what options can be explored to separate that space to avoid audio, visual, or other interruptions (example: folding partitions)?

Y N IP NA 4.   Are there blackboards and/or white marker boards?

Y N IP NA 5.   Are the chairs and tables light enough to be moved and maneuvered by patrons and staff?

Computers and Technology

Y N IP NA 1.   Are assistive technologies available?

Y N IP NA 2.   Are video transcripts available?

Y N IP NA 3.   Does the library have wheelchair accessible tables and computer workstations?

Y N IP NA 4.   Are laptops available to use in the library?

Y N IP NA 5.   Are keyboards ergonomically designed?

Y N IP NA 6.   Are high contrast keyboards available?

Y N IP NA 7.   Are computer monitors shielded from direct sunlight or glare?

Y N IP NA 8.   Does the library have print-to-speech scanners?

Y N IP NA 9.   Are braille embossers available?

Y N IP NA 10.   Are talking book readers available?

Y N IP NA 11.   Are low tech options available (i.e. magnifier sheets, magnifying glasses, flashlights, table lamps, etc.)?

Y N IP NA 12.   Are written transcripts of tutorials and videos on the library Web site available for both English speakers and others?

Y N IP NA 13.   Are apps available that can provide conversation practice?

Y N IP NA 14.   Does the library provide internet access and personal computing applications to patrons free of charge and regardless of library card status?

Y N IP NA 15.   Does the library provide workspaces that offer patrons the opportunity to use online services?

Y N IP NA 16.   Does the library provide free wireless internet access?

Y N IP NA 17.   Is the library flexible with time restrictions on computer use to allow users to complete desired tasks?

Y N IP NA 18.   Does the library avoid restricting activities users can engage in on the computers that may impact their ability to complete desired tasks?

Y N IP NA 19.   Can users borrow mobile wifi units?

Y N IP NA 20.   Can users borrow mobile devices?

Y N IP NA 21.   Does the library avoid restrictions or limits on printing or making copies that may impact users' ability to complete desired tasks?

Y N IP NA 22.   Are written transcripts of tutorials and videos on the library Web site available in simplified language (i.e. not children's version)?

Y N IP NA 23.   Can users adjust the reading level of information?

Y N IP NA 24.   Are workstations staggered to enhance noise control?

Y N IP NA 25.   Does the library provide ergonomic workstations/ chairs for users and staff?

Y N IP NA 26.   Is a staff member managing upgrades to software to ensure products contain the latest accessibility tools?

Y N IP NA 27.   Are there apps available that assist with social skills?

Y N IP NA 28.   Are there lightweight and/or portable devices offered as alternatives to workstations?

Y N IP NA 29.   Are strategies in place to assist users with using the library's wireless network?

Y N IP NA 30.   Can users bring their own adaptive devices and/or check out adaptive technology equipment for home use?

Y N IP NA 31.   Are alternative mouses or touch pads available (senior mouse, jelly bean switch, etc.)?

Y N IP NA 32.   Are workstations staggered to enhance privacy?

Collection Spaces

Y N IP NA 1.   Are there a variety of display options (sloping shelves, spinners, etc.)?

Y N IP NA 2.   Are there no more than eight 36-inch sections of shelving without a break?

Y N IP NA 3.   Does length of shelving and width of aisles take traffic patterns and accessibility into consideration?

Y N IP NA 4.   Is there a method for accessing high shelves for those unable to reach?

Y N IP NA 5.   Are shelving units sturdy? Braced or anchored?

Y N IP NA 6.   Are all stacks and shelves clearly labelled?

Y N IP NA 7.   Are stack labels large enough to be seen?

Y N IP NA 8.   Are there braille shelf markers?

Y N IP NA 9.   Are there special features like built-in lighting?

Y N IP NA 10.   Is there a clear distinction between floors and walls to assist the visually impaired?

Y N IP NA 11.   Are any stacks labelled in any non-dominant languages?

Y N IP NA 12.   Have visual cues (photos, illustrations) been used to identify stack contents?

Y N IP NA 13.   Are shelving units smoothly finished with no sharp edges?

Y N IP NA 14.   Are there accessories to display and house a variety of material types (compact discs, oversized and miniature materials, odd-shaped items, etc.)?

Y N IP NA 15.   Is there a minimum of 36 inches between stacking shelves?

Restrooms

Y N IP NA 1.   Does the facility have wheelchair accessible restrooms and are the restrooms well marked with signs indicating they are wheelchair accessible?

Y N IP NA 2.   Are restrooms marked with pictograms for those who cannot read English?

Y N IP NA 3.   Are there gender-neutral restrooms available?

Y N IP NA 4.   Do single occupancy restroom facilities use gender-neutral signage for those facilities?

Y N IP NA 5.   Are gender-neutral restrooms available on all floors/service areas?

Y N IP NA 6.   Are auxiliary areas and items such as restrooms and drinking fountains scaled for children located in the children's area?

Y N IP NA 7.   Do all of the restrooms include an area for changing diapers?

Y N IP NA 8.   Are there adult changing stations available?

Staff Areas

Y N IP NA 1.   Do library staff have access to hearing aid and volume control telephones?

Y N IP NA 2.   Is there an area with reduced distractions for staff to work?

Y N IP NA 3.   Are white noise or environmental sound machines acceptable or available for use?

Y N IP NA 4.   Does the library provide ergonomic workstations for staff?

Y N IP NA 5.   Are counters/tables at a comfortable height as to avoid injury from lifting?

Y N IP NA 6.   Are there secure spaces for staff's professional and personal use (i.e. lockers)?

Y N IP NA 7.   Are employee posters clearly posted and available in other languages and formats?

Access

Location, Hours, and Services

Y N IP NA 1.   Is the library located near public transportation and community services?

Y N IP NA 2.   Are library hours fixed and prominently posted?

Y N IP NA 3.   Are open hours based on community need?

Y N IP NA 4.   Do library hours cater to the different shifts that people work? E.g. Does someone who works third shift have access to the library?

Library Card Registration

Y N IP NA 1.   Are written materials available with step-by-step instructions to assist patrons with new library card registration?

Y N IP NA 2.   Is there a work surface/work space that is easily accessible to patrons to allow them to register for a library card?

Y N IP NA 3.   Does the library provide training for staff to assist visually-impaired patrons and those who do not read with library card registration?

Y N IP NA 4.   Are library card applications printed in multiple languages?

Y N IP NA 5.   Does the library charge for a library card or replacement card?

Y N IP NA 6.   When creating a new card, does the library accept something other than a photo ID as proof of identity, and offer to send a postcard so people can have proof of address?

Y N IP NA 7.   Does the library card application form avoid requiring binary gender identification?

Y N IP NA 8.   Does the library card registration application instruct patrons to notify the library of preferred name (even if the name has not been legally changed), i.e. individual transitioning.

Online Access (Website and Catalog)

Y N IP NA 1.   Is the library website ADA compliant?
Y N IP NA 2.   Are there captions for any video content?
Y N IP NA 3.   Can content be converted to large print, braille, speech, symbols?
Y N IP NA 4.   Can content be converted to simpler language and multiple languages?
Y N IP NA 5.   Is information displayed in simple layouts and menus (i.e. not communicated solely by structure, color or graphic design?)
Y N IP NA 6.   Is the Web portal free of flickers and an excess of color?
Y N IP NA 7.   Does the website contain welcoming language for all sexualities and genders?
Y N IP NA 8.   Are there textual descriptions for any photographic content?
Y N IP NA 9.   Does the Web content work with different devices?
Y N IP NA 10.   Can the information be accessed through keyboard only (no mouse required)?

How Does the Library Engage With the Community?

The checklist is organized by areas of library service identified in the WI Public Library Standards. Each section provides a straightforward checklist that can be answered with Yes, No, In Progress, or Not Applicable. Use the Scoring Rubric to score each section. See "How to Use the Inclusive Services Assessment and Guide" for examples.

Marketing

Y N IP NA 1.   Do the graphics on library promotional materials include people from a range of ethnicities, genders, religions and abilities?
Y N IP NA 2.   Does the library follow social media related to a wide array of diverse populations and create content for the same diverse populations?
Y N IP NA 3.   Do library social media profiles or accounts include content that would be beneficial to all people?
Y N IP NA 4.   If the library provides accommodations for those with disabilities, do promotional materials communicate that, along with a clear path for requesting accommodation?
Y N IP NA 5.   Does the library place marketing materials where people from different backgrounds are likely to see them?
Y N IP NA 6.   Is the content of the library's marketing materials accessible to diverse populations?

Community Engagement

Y N IP NA 1.   Does the library regularly analyze the demographics of the community in which it is located?
Y N IP NA 2.   Does the library involve patrons, residents, local businesses and other key organizations and stakeholders when preparing the strategic plan?
Y N IP NA 3.   Has the library identified the needs and issues of specific groups in the community in collaboration with them?
Y N IP NA 4.   Does the library have multiple formats for receiving feedback from diverse community groups that account for potential barriers?

Y N IP NA 5. Is the library responsive to the feedback from groups and individuals in underrepresented communities?

Y N IP NA 6. Does the library work with community ambassadors to help promote the library?

Y N IP NA 7. Does the library have meaningful engagement and collaboration with neighborhoods, local organizations and businesses, with a set of shared priorities for the library and community?

Y N IP NA 8. Does the library seek out and engage with underrepresented communities to make sure that everyone feels welcome at the library?

Y N IP NA 9. Does the library work with organizations in the community to facilitate reciprocal sharing of information about programs, collections/materials and resources to the diverse populations in the community? (PFLAG, NAMI, ADRC, food pantries, housing assistance, etc.)

Y N IP NA 10. Does the library send staff to represent the library at meetings and events held by the various organizations in the community? (county/city youth coalitions, health or human services coalitions, Pride celebrations, heritage festivals, etc.)

Y N IP NA 11. Does the library collaborate with other institutions to ensure library service for people who can't come to the library (senior housing, assisted living, juvenile or adult detention, shelters/transitional housing, etc.)?

Y N IP NA 12. Does the library offer resources for people who are reintegrating into the community after incarceration?

Y N IP NA 13. Does the library work with other organizations (Lion's Club, Friends group, Community Center, etc.) to provide free food at library events, or summer lunch programs for children?

Funding

Y N IP NA 1. Does the library budget include funds for cultural competency and anti-bias training for library staff and volunteers?

Y N IP NA 2. Does the library budget include funds for cultural competency and anti-bias training for the Board of Trustees, Friends board members and Foundation board members?

Y N IP NA 3. Does the budget include funds for programming geared to the diverse groups in the community?

Y N IP NA 4. Does the budget include funds for purchasing materials for the collection that reflect the diversity in the community and beyond?

Y N IP NA 5. Does the budget allow for staff hours to spend outside the library connecting and providing services with diverse groups and populations?

Y N IP NA 6. Does the budget include funds for recruiting staff and volunteers of color?

Y N IP NA 7. Does the budget include funds to offer culturally relevant digital resources that have been reviewed and evaluated by peer reviewers?

Y N IP NA 8. Does the library seek out supplemental funding via grants, foundations and a Friends of the Library group to cover the costs of trainings, programs and special collections?

Y N IP NA 9. Does the library have a list of community members who would be willing to donate to the library or advocate for the library to have the diverse trainings, programs and collections?

Self Care for Library Workers

In order for library workers to provide consistent, empathetic, and sustainable service to their community, they must be able to attend to their own needs. Library administration needs to value the importance of creating an expectation of self-care among staff, as well as for themselves.   [We'll include a link to appendix for further individual assessment tools]

Y N IP NA 1.   Is library staff encouraged to take breaks during their shifts?
Y N IP NA 2.   Is library staff encouraged to take time away from the library?
Y N IP NA 3.   Is library staff encouraged to create healthy boundaries between work and home life?
Y N IP NA 4.   Does library administration respect staff work and home boundaries?
Y N IP NA 5.   Is library staff encouraged to take breaks from programming or on-going services?
Y N IP NA 6.   Is library staff encouraged to take time to reflect on programming and on-going services?
Y N IP NA 7.   Is library staff encouraged to take time to reflect on or process library incidents or stressors?
Y N IP NA 8.   Does library administration support self care behaviors of library staff?

Inclusive Culture at the Library

The library culture is integral to providing inclusive services. These considerations provide ways to enrich culture and foster professional development as individuals and organizationally.

Y N IP NA 1.   Do library staff have an understanding of what inclusivity means to the members of their community?
Y N IP NA 2.   Does library administration have conversations with staff about being an inclusive library?
Y N IP NA 3.   Are staff members properly trained to deal with the diverse populations in their community?
Y N IP NA 4.   Does staff adhere to core values of creating an inclusive environment at their library?
Y N IP NA 5.   Does staff put the customer/patron first?
Y N IP NA 6.   Are staff tasks focused on providing the best possible service?
Y N IP NA 7.   Is there a teamwork mentality in creating an inclusive environment at the library?
Y N IP NA 8.   Is there an atmosphere of respect among staff members and members in the community?
Y N IP NA 9.   Does everyone respect the decisions and choices made by the board and administration regarding community engagement and inclusivity at the library?
Y N IP NA 10.   Does staff make thoughtful decisions in dealing with patrons and members of the community as part of their daily work routine?
Y N IP NA 11.   Is there a measurement in place to track expected outcomes regarding community engagement and relationship building in their community?

Scoring Rubric

1. To score each section, give each answer the following number value:
   o Give each "Y" circled in the section a score of 1
   o Give each "N" circled in the section a score of 0
   o Give each "IP" circled in the section a score of 0.5
   o Give each "NA" circled in the section a score of 1

2. Add up the scores in each section to get a "raw score." For example, add up the scores of all of the answers in the Governance section, based on what was circled for each consideration. Because there are 26 considerations in that section, there is a maximum score of 26.

3. When you have scored a section, enter the raw score in the appropriate column on the scoring rubric.

4. Continue this process until all sections are scored.

[NOTE to reviewers: the green numbers in the "raw score" column are for illustrative purposes only. This column will be blank on the actual tool.]

https://docs.google.com/spreadsheets/d/144Za8FiQt-INoaI93CZQrsgvfdjGdtjtodivYl2hll/edit?usp=sharing

Remember that this is a self-evaluation tool. The scoring rubric is designed to help libraries to identify areas of strength, and of areas that may require some focus. One library may determine that a comparatively low score in the "Facility" section is worth the investment of time and money, while another library may choose to focus on a lower score in an area that requires less costly improvements, such as Governance. Only the local library board and staff can make that determination. This scoring rubric is intended as a prioritization aid.

Reflection Worksheet

Section to be addressed:

1. Describe how this looks in your library right now:

2. How do you want this to look in the future?

3. Why is this important to your library and community?

4. What steps do you need to take towards this future?

   - What assets do you have to work on this topic?

   - What information do you have or need to work on this topic? E.g. demographic data, anecdotal data, survey results, acknowledging invisible populations?

   - What is the feasibility of making changes?

5. With whom will you share this reflection? How and when?

BROWN DEER
PUBLIC LIBRARY

(414) 357-0106
Website: browndeerwi.org/library
Hours: Monday - Thursday 11:00 - 7:00
Friday 11:00 - 5:00
Saturday 10:00 - 2:00
Sunday: Closed

Telephone Renewal # (414) 277-0183
Online Renewal: countycat.mcfls.org

November 29, 2018 12:15 PM
Items checked out to: p16653294

Title: MCFLS Test Record;
Disregard Any Holds Related to this
Recor
Barcode: 434534
DUE DATE: 12-20-18

Title: MCFLS Test Record;
Disregard Any Holds Related to this
Recor
Barcode: 16161616161616
DUE DATE: 12-20-18

Total items checked out today: 2

Total items checked out on card:4

Total fines on card:$3.00
Please pay at your earliest convenience.

Items returned on or before the due date
will not be charged overdue fees.

Brown Deer Fines:
DVDs - $1.00/day - 3 day grace
Kindles - $1.00/day - no grace
All other items - $.15/day - 3 day grace
Reserved items not picked up - $1.00

You just saved an estimated $37 by
using the Library today.

Thank you for visiting the
Brown Deer Library!

C-92: Damaged or Missing Items

The procedure below is intended to be used to assist front line staff in dealing with damaged and missing items returned to their library; they are designed to remove the item from circulation with as little impact on the system and patrons as possible.

We recommend **all member libraries check for damage and missing pieces on all items entering their library,** including items returned at the circulation desk or through the RFID sorting machines. If a staff member notices an item with damage or missing pieces returned to their library, the first step is to determine whether their library owns that particular item. Once that has been established, the next step is to choose the appropriate set of instructions below.

- Items Returned to the Owning Location (FOR HOME LIBRARY)
- Items Returned to a Non-Owning Location (DELIVERY)

Items Returned to the Owning Location (FOR HOME LIBRARY)

1. Check in the item using the **Check In - Do Not Fulfill Holds** function (In Check In (No Patron) look under Tools on the main menu!). Contact Jen Schmidt if you need authorization for this task. For libraries using RFID sorting machines, the item may already be checked in automatically by the sorting machine. Proceed to step 2 if the item has been checked in already.
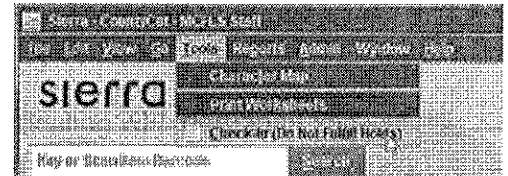
2. Open the item record for the damaged item in **Search/Holds** mode:

   a.   Go into the item record information to find out the last patron record number and the date the item was last checked in (optional)

   b.   Change the item status to "g" DAMAGED if the item is damaged.

   c.   CHECK THE HOLD STATUS. If ON HOLDSHELF, cancel the hold and redo it at the bib level changing the patron to first priority in the HOLDS QUEUE and adding a note to the hold with the reason. If TRANSIT(Hold) is the status, transfer the hold to the bib. If you library has an RFID sorting machine and there is a hold on the damaged item for pickup at your location, you will need to contact the patron and notify them that the item is not available. The hold pickup notice will already have been entered into the queue and in some cases the patron may have already been notified. If the item cannot be salvaged and there are no other items, cancel the hold asap.

3. Contact the patron as soon as possible and inform them of the damage or missing pieces.

4. **Damaged items only:** as soon as possible, repair the damaged item or flag the item for deletion by changing the status to "e". Assess patron fines according to your library policy.

Items Returned to a Non-Owning Location (FOR DELIVERY)

1. Check in the item using the **Check In - Do Not Fulfill Holds** function (In Check In (No Patron) look under Tools on the main menu!). Contact Jen Schmidt if you need authorization for this task. For libraries using RFID sorting machines, the item may already be checked in automatically by the sorting machine. Proceed to step 2 if the item has been checked in already.For those libraries using RFID sorting machines, the item may already be checked in automatically by the sorting machine. Proceed to step 2 if the item has been checked in already.

2. Open the item record for the item using the **Search/Holds** mode in Sierra Circulation.

   a. CHECK THE HOLD STATUS. If ON HOLDSHELF, cancel the hold and redo it at the bib level changing the patron to first priority in the HOLDS QUEUE and adding a note to the hold with the reason. If TRANSIT(Hold) is the status, transfer the hold to the bib.
   CHECK IF THERE IS A HOLD on the item and MOVE the hold to an available item on the same bib record. If your library has an RFID sorting machine and there is a hold on the damaged item for pickup at your location, you will need to contact the patron and notify them that the item is not available. The hold pickup notice will already have been entered into the queue and in some cases the patron may have already been notified.

   b. CHANGE THE ITEM STATUS:
   - *For damaged items, change the status to (1) INTRNST/DMGD.*
   - *For missing pieces, change the status to (7) INTRNST/PARTIAL*

   c. *PUT A MESSAGE in the ITEM RECORD!!*
   SIERRA LOGINS SHOULD HAVE FUNCTIONS KEYS ALREADY SET UP.

   Use CTRL-F5 and CTRL-F6 in that order.
   This will start and insert a message. Then you need to enter in your library code, a short description, initials and the date. Contact Kate at MCFLS if you need this keyboard shortcut   !

   ITEM RETURNED [DAMAGED/MISSING] @ <library code>, <description>, <initials> <date>

   DAMAGED ITEMS:
   ITEM RETURNED DAMAGED @ 41, cracked cd, SH 03-14-2011)

   MISSING PIECES:
   ITEM RETURNED MISSING THE FOLLOWING PIECES: 2nd DVD @ 14, DB 03/14/11

1. *Send the item to the OWNING LOCATION through delivery in an interoffice envelope. As of 2018, it is no longer required to do a screen shot or fill out a DAMAGED ITEM slip.*

2. At the owning location, open the item record in Search/Holds mode:
   a. *REMOVE the DAMAGED message if replacing the item as well as any old IN TRANSIT message that got ghosted.*

   b. MOVE ANY item level HOLDS off the item to an available item on the same bib. If there are no more available items, determine if the item is salvageable or replaceable--if not, cancel the holds.

3. *CONTACT THE PATRON* as soon as possible to inform them of the damage.

4. **Damaged items only:** as soon as possible, repair the damaged item or flag the item for deletion by changing the status to "e". Assess patron fines according to your library policy.

MILWAUKEE COUNTY
FEDERATED LIBRARY SYSTEM

How to Get a Library Card at a Milwaukee County public library.

Please bring in two valid, current forms of ID, one with your legal name and one with your legal name and address to confirm your Milwaukee County residence.

An electron version of an ID will be accepted but must be current.

Examples of acceptable NAME ID:

- Valid Driver's license or state ID
- Valid Municipal ID
- Current Student Picture ID
- Current Military ID
- Employment Photo ID
- Valid Wisconsin License which includes physical characteristics, such as a fishing or hunting license
- Passport
- Birth Certificate

Examples of acceptable NAME & ADDRESS ID:

- Valid Driver's license
- Valid Municipal ID
- Voter ID or Voter registration via MyVote.gov
- A valid & current rental lease agreement with your name & address. No handwritten receipts.
- Postmarked mail received at your home within the last 30 days. No window envelopes, junk mail or magazines.
- Utility bills (gas, electric, cable, phone) mailed to you within the last month
- Recent report card from school
- Current school schedule with address
- Current insurance card with name & address
- Recent paycheck stub with name and address
- Pre-printed personal checks (with your checkbook)
- Vehicle registration

Requirements may vary by municipality.
Please be sure that the information you are providing is accurate, as it is unlawful to provide false information to receive a library card.
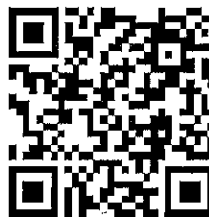
FL-37(F)

FL-37 Proposed Change
Attachment G (12/06/18)
Page 1 of 2

Did you Know?

You can start your Library Card registration online!

Online Registration

https://countycat.mcfls.org/selfreg

If you are a Milwaukee County resident and do not already have a library card, you can register online to be a patron of the library system. The link below is for new registrations only. Upon successful completion, you will have the ability to place up to 5 requests for materials. To check out materials, you will need to bring two forms of identification in person to your community library and complete the Registration process. Minors must be accompanied by a parent or legal guardian to complete the registration process.

MILWAUKEE COUNTY
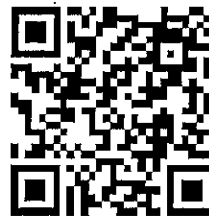FEDERATED LIBRARY SYSTEM

709 North Eighth Street
Milwaukee, WI 53233
http://www.mcfls.org/

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MILWAUKEE COUNTY
FEDERATED LIBRARY SYSTEM

709 North Eighth Street
Milwaukee, WI 53233
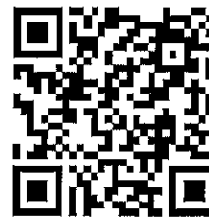http://www.mcfls.org/

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FL-37 Proposed Change
Attachment G (12/06/18)
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WPLC OverDrive Instant Digital Card (IDC) Program Fact Sheet

Overview of IDC For a Fee

- OverDrive's Instant Digital Card (IDC) uses an end-user's name and mobile phone number to validate that they have a recent residential address within the boundaries of WI.
- If the end-user is validated as having a recent residential address within the Service Area, the patron's mobile phone number will serve as a digital library card that enables them to borrow digital content from Library's OverDrive digital collection.
- OverDrive will charge a fee of ninety cents ($0.90) each time a Digital Library Card is issued to a patron.
- OverDrive will invoice the consortium monthly via OverDrive Marketplace for the GLC Fee incurred during the previous month.

Overview of IDC For Free

- OverDrive has offered this program to the WPLC for free if we are willing to validate on mobile phone number **area code only.**
- It was noted the only information we would get about the patron would be phone number and optional email address.

Additional IDC Questions and Answers received from OverDrive

- When a patron gets an IDC card, their history is recorded as the IDC Branch. When they get an actual library card with a new barcode, new checkouts with that card will be recorded to the new, correct branch. If their card number remains their phone number, it will remain as IDC. Old checkouts on the IDC card statistics are retained as IDC branch, they are not transferred and associated to the new library branch.
- WPLC asked if we could obtain the patron's nine-digit zip code to help determine service area if we used the for a fee program. OverDrive informed us this is not possible to get. As of today, it also can't capture the same geolocation data that Google grabs when you search for books or libraries. This is on the roadmap, though.
- We have control over how long the IDC cards are valid. We could potentially say the card is valid for a month instead of a year, for instance.
- It is possible to customize the checkout/hold limits for IDC users as well. So, if we wanted to allow fewer checkouts to encourage users to upgrade to full library cards, that is possible.
- When IDC user cards expire, OverDrive SMS messages them (no email). Because of length restrictions, they do not customize those messages. But they can customize the message displayed if the user logs in with an expired IDC card.
- IDC users will not have access to any Advantage account materials, unless they are shared to the consortium collection.
- If an IDC user does get a full card, their mobile phone account can be merged with their new library card, just like staff can do now for any user who gets a new card via OverDrive Marketplace's end-user support tools.
- Users who first download the Libby App, without a library card, can complete the IDC process and obtain access within Libby and do not need to use the website.