



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

**GENERAL INFORMATION**

Library System

Outagamie Waupaca Library System

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

The development of the 2024 system plan builds upon previous planning activities and previous plans. While many of the system's needs and problems do not change dramatically from year to year, new issues regularly arise, and ongoing issues experience a shift in focus or urgency.

Strategic Plan

In 2023, OWLS and NFLS completed a joint strategic planning process, which generated five high-level goals: sustainability and organizational health, explore and expand collaboration, equity of access, technology support and readiness, and cultivate innovation. Those goals inform this document.

Delivery

Delivery costs have increased steeply over the past several years. OWLS and OWLSnet member libraries support the launch of delivery pilot projects to increase equity of access to rapid, efficient delivery services as recommended in the PLSR report.

Future of Wisconsin Library Systems

Since 2013, OWLS has participated in or monitored statewide processes and discussions relating to ensuring a strong future for Wisconsin's systems, most notably the Public Library System Redesign process. In addition, OWLS has continued to investigate opportunities for collaboration with neighboring systems, counties, and libraries that are mutually beneficial. One objective in our new strategic plan is to explore the feasibility of a merger between NFLS and OWLS. We anticipate work on that objective will begin in late 2024 or 2025.

Financial Position

The significant increase in state aid to public library systems in 2023-2025 will enable OWLS to maintain current services and pursue objectives from our new strategic plan. However, due to inflationary pressures, OWLSnet fees increased by 2% in 2023, and will increase another 2% in 2024. An 11% increase in health insurance premiums for 2024 places further strain on the operating budget.

While the system's financial position appears to be secure for 2024, OWLS may face significant financial challenges in the future. In 2024, 47% of the OWLS operating budget will come from fees paid for services. Because the OWLS budget is so dependent on fees, the ability to continue current service levels will be threatened if local budget cuts affect the ability of member libraries to pay their fees. The fact that 100% of system aids come from the Universal Service Fund, rather than a general-purpose revenue (GPR), places the system aids in further jeopardy because some officials and industry groups don't believe this is an appropriate use of the Fund.

Funding for Nonresident Service

Pursuing adequate and equitable county and intersystem funding for nonresident services continues to be a high priority for OWLS. OWLS libraries provide a high volume of service to non-residents. OWLS libraries have historically circulated more items to people living outside of the system area than do the libraries in any other system.

Excellent progress has been made in achieving equitable county funding. Both Outagamie and Waupaca Counties have funded municipal libraries at or near 100% of their respective funding formulas since 2014. In 2019, Waupaca County and Outagamie County approved new library service plans for 2020-2024. The plans include reimbursement for electronic circulation. Both counties are projected to fund at 100% of the formula in 2024. New county plans will be developed in 2024.

Calumet County continues to do a commendable job of compensating OWLS libraries for providing service to residents of the County under the intersystem agreement between OWLS and the Manitowoc Calumet Library System

GENERAL INFORMATION (cont'd.)

With the passage of Act 157 in 2014, some of the issues regarding equity have been addressed. Both Brown County and Outagamie County have reimbursed libraries for non-resident usage in 2015-2023. Waushara County began reimbursing Waupaca County libraries in 2011. Winnebago County will reimburse Waupaca County libraries in 2024.

However due to the treatment of consolidated county libraries in statute, funding inequities remain. Beginning in 2015, the Marion and Clintonville libraries billed for service provided to Shawano County residents living in areas not served by a library. However, Shawano County became a consolidated county library at the end of 2017, which means that the Marion and Clintonville libraries are now unable to bill for services provided to residents of Shawano County residing outside of municipalities with libraries. An intersystem agreement with NFLS provides compensation for a portion of this service.

Another significant inequity exists between Portage County and Waupaca County. The Waupaca Area Public Library provides a significant level of service to Portage County residents, but because Portage County operates a consolidated county library and does not bill adjacent counties, they are not required to pay for the service they receive.

OWLS will continue to monitor these situations and work with member libraries and adjacent library systems to determine the most effective methods for achieving equity in library services between systems, counties and libraries. In addition, OWLS will continue to pursue legislative remedies to address inequities should it be deemed appropriate.

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

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

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

This year's plan reflects input from a variety of sources. The OWLS professional staff meet throughout the year to discuss issues important to the future of the system. The professional staff also met individually with staff from the Appleton Public Library, Nicolet Federated Library System, and member libraries on many occasions.

Youth Services Meetings are held regularly to give OWLS children's librarians an opportunity to share with each other and with system representatives. The Administrative Advisory Committee of OWLSnet generally meets every other month. Input from the directors, children's librarians, and AAC meetings was considered in the development of the plan.

In 2023 OWLS scheduled eight meetings of member directors. Many of the priorities outlined in this plan were derived from those discussions.

The OWLS Board meets monthly, holding a number of discussions and taking a variety of actions that contributed to the development of this plan.

In addition to these regular events, data gathering from the joint strategic planning process informed this year's plan development.

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

- No, the library system does not have a formally appointed advisory committee.
- Yes, the library system has a formally appointed advisory committee.

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



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 ASSURANCES
 

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The following plan and compliance document provides assurance that your public library system intends to comply with all statutory requirements for public library systems for calendar year ~~2024~~. Indicate, with a check, your system's intent to comply with each system requirement and provide the requested information under each system requirement.

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

**Membership Agreements**

- Wis. Stat. § 43.24(2)(a) Written agreements that comply with Wis. Stat. § 43.15(4)(c)4 with all member libraries.
- The system will provide a sample copy of the agreement with a list of all members signing and the dates signed to the Division by January 15. (The system does not need to file multiple copies of the same agreement; only a sample copy of each type of agreement is necessary.)

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

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**Resource Library Agreement**

- Wis. Stat. § 43.24(2)(b) Backup reference, information and interlibrary loan services from the system resource library, including the development of and access to specialized collections, as evidenced by a written agreement with that library.
- The system will provide a signed copy of the resource library agreement to the Division by January 15.

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

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**Reference Referral, Interlibrary Loan, and Technology**

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

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

OWLS maintains the database of member library bibliographic records and holdings. The majority of interloan transactions occur between libraries using the OWLSnet shared automation system.

OWLS and NFLS provide member libraries and their patrons with access to the other area library catalogs via InfoSoup.

OWLS uses WISCAT to provide resource sharing for our member libraries. OWLS staff provide support and training for using the service while member libraries manage their own requests to and from WISCAT.

OWLS and NFLS provide OWLSnet members with access to electronic resources including Ancestry Library Edition and Tumblebooks.

OWLS and NFLS monitor and make recommendations for addressing any resource sharing inequities that may emerge between systems or between member libraries.

OWLS maintains PC time management and print management solutions for public access PCs and wireless devices in the library.

OWLS will continue to improve ILS workflows and roll out new features.

OWLS will continue to maintain and improve the InfoSoup public access catalog via Bibliocommons and provide OWLSnet member libraries with customized library apps via Capira.

OWLS will monitor total network bandwidth usage and upgrade individual library connections as needed.

OWLS facilitates multitype collaboration by continuing some services previously provided by the Fox Valley Library Council, such as insurance for courtesy cards,

OWLS contracts with an authority control service to improve bibliographic data quality and catalog search results.

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

OWLS will continue a comprehensive review of OWLSnet policies and procedures with AAC in 2024.

OWLS will facilitate the revision of county library service plans for Outagamie and Waupaca Counties in 2024.

A new Network Manager hired in September 2023 will lead implementation of improved network security practices.

Pending the outcome of an AAC vote in November, OWLS may launch an ILS migration exploration in 2024.

OWLS hopes to implement reading history for patrons on Bibliocommons contingent upon availability of software developers at the vendor.

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## ASSURANCES (cont'd)

**Inservice Training**

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

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

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

OWLS provides orientation and training for new library directors.

OWLS provides training or consultation to staff of member libraries in the effective use of system-provided electronic information resources, software, and other technologies.

OWLS provides a limited number of scholarships for librarians, staff, and trustees to attend workshops and conferences.

OWLS validates and maintain librarian certification records.

Through the NEWI regional CE agreement, OWLS offers an appropriate schedule of continuing education workshops and training classes on topics of interest to librarians, staff, and trustees of member and area libraries.

OWLS develops training for library staff and patrons on using the ILS and discovery layer.

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

OWLS will place additional focus and resources on operational training for frontline library staff in 2024.

OWLS plans to implement Niche Academy for staff training with LSTA funds in 2024.

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

NEWI Coordinator at Winnefox: Angela Schneider, [aschneider@winnefox.org](mailto:aschneider@winnefox.org)

NEWI staff support at OWLS: Melissa Knight, [mknight@owlsweb.org](mailto:mknight@owlsweb.org)

CE Validator: Kristin Laufenberg, [klaufenberg@owlsweb.org](mailto:klaufenberg@owlsweb.org)

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

OWLS, NFLS, MCLS have contracted with Winnefox to provide CE to the entire NEWI region in 2023-2025.

**Delivery and Communication**

- Wis. Stat. § 43.24 (2)(fm) Electronic delivery of information and physical delivery of library materials to participating libraries.

**List ongoing activities related to this requirement. For physical delivery reference resources, personnel, and vendors.**

OWLS contracts with a vendor to provide five day a week delivery service to all member libraries.

OWLS participates in the statewide delivery service operated by the South Central Library System.

OWLS monitors delivery volume and implements any necessary adjustments or modifications to the delivery service.

OWLS utilizes email, web postings, and Net Support Notify software as its primary methods for rapidly disseminating information to member libraries.

OWLS relies on OWLSnet.org and OWLSweb.org, the system websites, to provide a rich variety of relevant content and links helpful to library staff and trustees.

OWLS provides web design and hosting services to facilitate the electronic delivery of information from members to their constituents.

OWLS staff assist member libraries with posting electronic content contained in local databases on their websites and with contributing digital resources to Recollection Wisconsin.

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

OWLS will continue monitoring the implementation of the statewide hub and spokes model for delivery.

OWLS and NFLS will explore the feasibility of sorting materials for delivery in house rather than contracting with Waltco.

**Service Agreements**

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

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

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

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



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**ASSURANCES (cont'd)**


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**Other Types of Libraries**

- Wis. Stat. § 43.24(2)(L) Cooperation and continuous planning with other types of libraries in the system area, which results in agreements with those libraries for the appropriate sharing of library resources to benefit the clientele of all libraries in the system area.
- The system will have agreements with other types of libraries, or if the system participates in a cooperation agreement with a multitype organization to meet the purposes of this goal, there is established a clear link between the system and the individual members of the multitype organization. The system will provide a copy of the agreement with a list of all signing libraries to the Division by January 15.

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

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

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**Library Technology and Resource Sharing Plan**

- Wis. Stat. § 43.24(2)(m) Planning with the division and with participating public libraries and other types of libraries in the area in regard to library technology and the sharing of resources. By January 1, 2000, and every fifth January 1 thereafter, the public library system shall submit to the division a written plan for library technology and the sharing of resources.
- The system will provide the current plan for library technology and resource sharing to the Division by January 1, 2024 if the system amended the plan since last submitting it to the Division or if the plan on file with the Division is no longer valid. See [the Library System Technology and Resource Sharing plan webpage](#) for the most current version of the system library technology and resource sharing plan.

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

<https://owlsweb.org/about/plans>

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

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

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

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

A new five-year Technology & Resource Sharing plan will be developed in 2024 building on the strategic plan adopted in 2023.

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**Professional Consultation**

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

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

Director Bradley Shipps provides consulting in administration and finance, planning and evaluation, and policy issues.

Consulting & Outreach Librarian Kristin Laufenberg provides consulting on a variety of topics and oversees the Youth Services Liaison and the Inclusive Services Liaison. Laufenberg also administers the new director mentor program.

OWLSnet Manager Amanda Lee and Circulation Specialist Molly Komp provide consulting in automation, technical services, staff training, and collection development.

Network Manager Bryan Durkee and Technology Coordinator Julie Leopold Brecken and Computer Technician Joe Lawton provide consulting in technology services and computer selection and use.

Web & Marketing Coordinator Chad Glamann provides consulting in marketing, PR, and advocacy as well as graphic design services.

Catalog Librarian John Wisneski and Cataloging Assistant Debbie White provide consulting in cataloging best practices.

All members of the OWLS professional team are involved in new director orientation.

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 ASSURANCES (cont'd)
 

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Upon request, the OWLS professional team will visit member libraries and provide consulting reports in the areas of general library organization or workflow analysis.

OWLS has provided financial and staff support for the Waupaca Area Public Library (2019), the Clintonville Public Library (2020-2021), the Neuschafer Community Library in Fremont (2021-22), the Scandinavia Public Library (2022-23), Sturm Memorial Library in Manawa (2022-23), and Hortonville Public Library (2023-24) to participate in the WiLS Strategic Planning Cohort for small libraries.

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

In 2024, we plan to pilot a regional consulting cooperative with NFLS and WVLS.

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**Inclusive Services**

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

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

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

OWLS will seek out vendors and cost estimates for translation services for InfoSoup marketing materials and other patron facing documents for possible inclusion in the 2025 budget.

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**Other Service Programs**

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

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

#### Library Services to Youth

OWLS provides an email discussion list specifically for youth librarians to share information.

OWLS facilitates the interaction of youth librarians at 3-5 meetings per year.

OWLS provides programming grants for summer library program performers or other special program activities.

OWLS contracts with a member library for a librarian to serve as the system's Youth Services Liaison.

#### Public Information and Promotion

OWLS provides design and printing services for member libraries and system programs, including bookmarks, resource lists, brochures, signs, forms, logo design, and buttons for a nominal cost.

OWLS produces and distributes marketing toolkits for implementation by member libraries.

OWLS seeks to ensure that all member libraries, especially those with new directors, are aware of our full range of services.

OWLS provides materials to OWLSnet member libraries to promote the use of InfoSoup.

#### Literacy Support

OWLS supports the work of Fox Valley Literacy providing grants, printing, design, and delivery of materials to tutors in other communities.

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**Administration**

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

The system will submit the ~~2023~~ system audit to the Division no later than September 30, 2024.

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**Budget**

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

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**COLLABORATIVE ACTIVITIES**

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

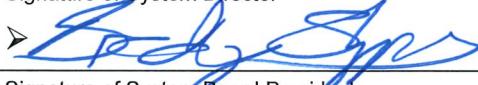
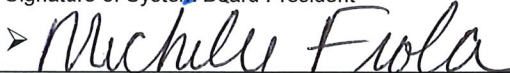
There are several activities that OWLS shares with other entities. The primary service is OWLSnet which is shared with the libraries of OWLS and those in NFLS (excluding Brown County and Menominee). OWLS also cooperates with other library systems in providing CE opportunities. OWLS provides financial support (as well as in-kind services) to the Fox Valley Literacy Council. OWLS also participates in Recollection Wisconsin.

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


Activity	Amount
1. OWLSnet automation partnership	\$100,000
2. NEWI CE Agreement	\$50,000
3. WPLC	\$50,000
4. Fox Valley Literacy	\$4,500
5. Recollection Wisconsin	\$3,000
6.	
7.	
8.	
9.	
10.	
<b>Cost Benefit Total</b>	<b>\$207,500</b>

**CERTIFICATION**

**WE, THE UNDERSIGNED, CERTIFY** that to the best of our knowledge, the information provided in this document and any attachments is true and correct, and that the system will be in full compliance with all applicable provisions of Chapter 43 of the Wisconsin Statutes for the year 2024.

Name of System Director Bradley Shipps	Signature of System Director 	Date Signed Mo./Day/Yr. 9/21/2023
Name of System Board President Michelle Frola	Signature of System Board President 	Date Signed Mo./Day/Yr. 9/22/2023

**FOR DPI USE  
LIBRARY SYSTEM PLAN APPROVAL**

Pursuant to Wis. Statutes, the plan contained herein is: <input type="checkbox"/> Approved <input type="checkbox"/> Provisionally Approved <i>See Comments.</i> <input type="checkbox"/> Not Approved <i>See Comments.</i>	DLT Assistant Superintendent Signature  	Date Signed Mo./Day/Yr.
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Comments

**PUBLIC LIBRARY SYSTEM ~~2021~~  
ANNUAL PROGRAM BUDGET**

Program	2024 Public Library System Aid	System Aid Carryover and Interest Earned	Other State and Federal Library Program Funds	All Other Income	Total
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**Technology, Reference, and Interlibrary Loan\***

1. OWLSnet	\$186,542	\$0	\$6,268	\$876,658	
2. OWLS	\$167,445	\$0	\$0	\$5,000	
3. Recollection Wisconsin	\$0	\$0	\$75,000	\$0	
4.					
5. Electronic Resources	\$21,010	\$0	\$0	\$101,490	
<b>Program Total</b>	<b>\$374,997</b>	<b>\$0</b>	<b>\$81,268</b>	<b>\$983,148</b>	<b>\$1,439,413</b>

**Continuing Education and Consulting Service\***

1. CE & Consulting	\$103,848	\$0	\$7,229	\$0	
2.					
<b>Program Total</b>	<b>\$103,848</b>	<b>\$0</b>	<b>\$7,229</b>	<b>\$0</b>	<b>\$111,077</b>

Delivery Services	\$151,457	\$0	\$0	\$30,834	\$182,291
Inclusive Services	\$19,714	\$0	\$0	\$0	\$19,714
Library Collection Development	\$0	\$0	\$0	\$0	\$0
Direct Payment to Members for Nonresident Access	\$0	\$0	\$0	\$3,122,014	\$3,122,014
Direct Nonresident Access Payments Across System Borders	\$10,400	\$0	\$0	\$466,956	\$477,356
Youth Services	\$46,804	\$0	\$0	\$0	\$46,804
Public Information	\$68,284	\$0	\$0	\$5,000	\$73,284
Administration	\$111,228	\$15,000	\$0	\$500	\$126,728
<b>Subtotal</b>	<b>\$407,887</b>	<b>\$15,000</b>	<b>\$0</b>	<b>\$3,625,304</b>	<b>\$4,048,191</b>

**Other System Programs**

1. Capital	\$4,041	\$0	\$0	\$0	\$4,041
2.					\$0
<b>Program Total</b>	<b>\$4,041</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$4,041</b>
<b>Grand Totals</b>	<b>\$890,773</b>	<b>\$15,000</b>	<b>\$88,497</b>	<b>\$4,608,452</b>	<b>\$5,602,722</b>

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