Wisconsin Department of Public Instruction
**PUBLIC LIBRARY SYSTEM PLAN AND
CERTIFICATION OF INTENT TO COMPLY
CALENDAR YEAR 2010**
PI-2446 (Rev. 08-09)

**INSTRUCTIONS:** Complete and submit by **October 16, 2009**, to:

**WISCONSIN DEPARTMENT OF PUBLIC INSTRUCTION
ATTN: MIKE CROSS
DIVISION FOR LIBRARIES, TECHNOLOGY, AND
   COMMUNITY LEARNING
P.O. BOX 7841
MADISON, WI 53707-7841**

## GENERAL INFORMATION

Library System

Outagamie Waupaca Library System

Describe demographic, economic, and other facts about your system that influenced the development of this and other system plans.

Nine of the system's sixteen member libraries are located in communities of fewer than 3000 people; eight of those nine are in communities of fewer than 2000 people. Four libraries serve communities whose population is between 3000 and 8000. Kaukauna and Kimberly/Little Chute libraries have community populations of 14,990 and 17,493, respectively. Appleton Public Library has the largest municipal population in the system area, i.e., 72,400 people.

While the diversity within the area's population is still relatively small in raw numbers, the system is seeing significant growth in the Hispanic community. Data from the 2000 census indicates that the Hispanic or Latino population in Wisconsin more than doubled from 1990 to 2000, and the pace of growth of the Hispanic population is faster in Wisconsin than in the U.S. as a whole. The percent of change in Outagamie County was 225%, placing it tenth among the state's counties. The percent of growth in Waupaca County was 76%, still a substantial increase. The Asian population in Outagamie County, especially in Appleton and Kaukauna, constitutes between 2% and 5% of the total population.

OWLS libraries provide a high volume of service to patrons living outside of the municipalities that operate the libraries. For example, OWLS libraries loaned over 1,446,200 items to non-residents in 2008. Approximately 46% of OWLS area residents live in jurisdictions without local libraries, i.e., 45% of Outagamie County residents and 60% of Waupaca County residents. The percentages of residents living outside of communities with libraries have increased in both counties in recent years. This is the result of growth in suburban towns that don't operate their own libraries.

Several libraries are located near the boundaries of the system, and more people tend to come into the system area to use libraries than to go out of the area. The geography of the system area affects the use of libraries in other ways. No library is more than 1-1/2 hours from any other library in the system, and several are located only minutes apart. Consequently, many residents of the system area use more than one library. A significant amount of crossover (inter-municipal) borrowing takes place in the system (c. 163,000 circulations in 2008).

OWLS is one of the smaller of the seventeen systems in Wisconsin. In 2007, OWLS ranked eleventh in total population and eleventh in state aid received. More than half of the systems include more counties than OWLS. When aggregate measures from OWLS and its member libraries are compared with those of other systems, predictably, the system ranks near its population ranking (11th) on the raw data for many of the measures. Adjusting for population by using per capita comparisons, the system typically ranks higher than eleventh.

When OWLS aggregate measures are compared with those of other systems, some of the results are particularly striking.

- On a per capita basis, OWLS libraries lend more items to non-residents than do libraries in any other system, and circulation to county residents living outside of communities with libraries is among the highest in the state.

**ASSURANCES (cont.)**

- OWLS libraries typically provide more service to residents of other systems than libraries in any other system.  In fact, OWLS libraries generally provide nearly a fifth of all the intersystem non-resident circulation in the state.
- OWLS typically ranks in the top third of all systems in the number of items circulated per capita by member libraries.
- OWLS libraries engage in high levels of resource sharing; the number of items loaned to and borrowed from other libraries is among the highest in the state.
- OWLS libraries experience a high volume of traffic, i.e., they have lots of people coming through their doors.  Typically, the number of visits per capita and the number of programs attended per capita rank in the top quarter of all systems.
- OWLS generally ranks near the bottom of all systems in the number of public computers available to patrons.
- OWLS typically ranks near the top of all systems in per capita support by residents of municipalities with libraries, but OWLS ranks in the bottom third of systems in per capita support by non-residents.

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

The development of the 2010 system plan builds upon previous planning activities and previous plans.  Many of the system's most significant needs and problems do not change dramatically from year to year.  The challenge in planning is to find new and useful perspectives that are productive in addressing ongoing issues.

Tension between competing values and circumstances is inherent in the nature of public library systems, and the tension surrounding these competing values and circumstances continually informs system planning.
- The most basic tension is that between the demand for system services and the resources available to provide them.  As OWLS continues to develop and improve the level of services it provides to member libraries and their patrons, expectations are also raised about the services the system will provide in the future.  Unfortunately, neither sufficient staff nor financial resources are available for the system to address all of the service needs it has identified.
- A tension that regularly occurs within OWLS is that between the system's role of providing leadership to the libraries in developing new technologies and services and its role of providing responsive customer service, i.e., doing what the member libraries want the system to do.  Again, because of limited resources, the system must make difficult decisions in order to maintain an optimal balance between leading the libraries in new directions and increasing more traditional services.
- An interesting technology-related tension exists between the desire of some staff and patrons to implement new technologies and the ability of all library staff to adapt to continual changes.  The system strives to find the proper balance between the demand for new technologies and the ability to implement such changes.  It is a priority for the system to improve the information and training required to successfully implement technology changes.
- Perhaps the most difficult tension for systems is between the autonomy of local libraries and the need to collaborate effectively in a system or consortium environment.  While OWLS supports local library autonomy, in a system or consortium environment local libraries must recognize that local decisions often affect other libraries.  While systems cannot and should not try to dictate local library decisions, member libraries should not make independent decisions that might force neighboring libraries to change their policies or practices.  Determining what should be a local library decision and what should be a system or group decision can be difficult and sometimes disagreeable.

| | ASSURANCES (cont.) | |
|---|---|---|

- Finally, there is an inherent tension in the structure of public library systems because systems have so many different constituencies, e.g., counties, public libraries, non-public libraries, DPI, municipalities without libraries. For example, OWLS is a joint agency of Outagamie and Waupaca Counties, but it is also an advocate for its member libraries in county library planning and funding decisions. Attempting to keep the proper balance between the varying interests of constituents is a challenging task.

A number of 2010 issues and priorities are described below.

Technology Services

*OWLS Technology and Resource Sharing Plan: 2007-2010* and *OWLSnet Plan: 2007-2010* contain extensive detail regarding technology service goals, objectives, and activities. The priorities contained in these plans continue to be priorities in the 2010 System Plan, and they are summarized below:

- Supporting member library use of technology including providing training to library staff, supporting library PCs, assisting libraries with the development of electronic content, and implementing new services requested by member libraries when feasible.
- Developing and enhancing technology-based services and resources including enhancing InfoSoup to make it more helpful for library patrons, continuing to enhance functions of the Millennium integrated library system, and continuing to provide and evaluate subscription-based electronic resources for libraries and patrons.
- Maintaining the OWLSnet network infrastructure by securing adequate wide area network and Internet bandwidth to meet library needs, maintaining and updating network equipment, and implementing appropriate security measures.
- Optimizing the governance and operation of OWLSnet by codifying membership requirements, policies, and procedures, orienting new library directors regarding the responsibilities of membership, and improving the effectiveness of meetings. It is also a priority for the System to encourage the standardization of policies, procedures, and practices among network libraries.
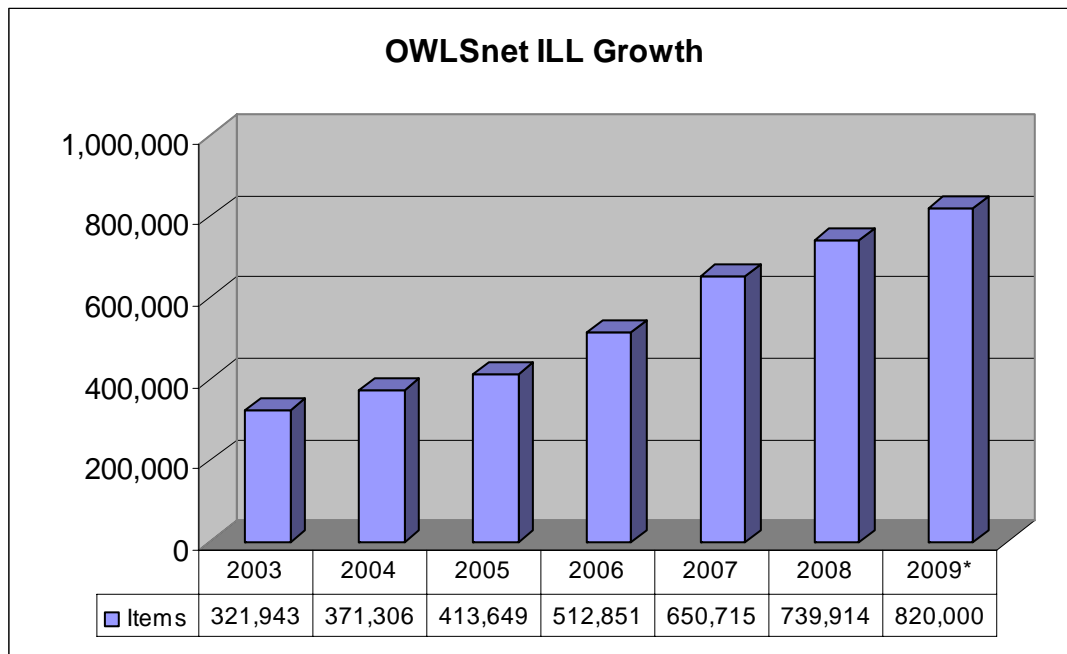
Perhaps the most significant priority for 2010 is to update the *Technology and Resource Sharing Plan* and the *OWLSnet Plan*. Many circumstances have changed since these plans were last updated. Consequently, both plans need to be revised to consider the current economic, political, and library service environment.

Resource Sharing and Delivery

OWLSnet has continued to experience explosive growth in the volume of resource sharing. This year the number of items traveling among the libraries in the shared automation network is likely to exceed 820,000, up from 739,914 items in 2008. This increasing delivery volume presents challenges for the systems and their member libraries. More staff time and more space are needed to handle an increasing amount of materials. The need to allocate more staff and space to this task puts pressure on operating budgets and forces libraries to make difficult choices about the services they can provide.

For several years it has been OWLS position that this rate of growth is not sustainable because neither the system nor its member libraries have sufficient resources to handle such growth. In March 2009, OWLSnet member libraries voted to reduce the maximum number of holds allowed to 15 per patron, and this new limit was implemented in June. While it is too soon for a conclusive analysis, it appears that the reduction in the maximum number of holds allowed may be reducing the rate of resource sharing growth.

**ASSURANCES (cont.)**

### OWLSnet ILL Growth

| | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009* |
|---|---|---|---|---|---|---|---|
| Items | 321,943 | 371,306 | 413,649 | 512,851 | 650,715 | 739,914 | 820,000 |

*Estimate based on January through September activity

Priorities for 2010 will be to monitor the change in the maximum number of holds, to investigate more efficient methods for getting materials to patrons, and to implement changes that would improve efficiency or further reduce the growth in resource sharing.

Funding Inequities

Addressing county and intersystem funding inequities continues to be a priority for OWLS. This task is a difficult one for two reasons. First, OWLS libraries provide a high volume of service to non-residents. In ten of OWLS sixteen member libraries, over 50% of circulation is to non-residents. Non-resident circulation at member libraries ranges from 38% to 70% of total circulation. Second, OWLS libraries circulate more items to people living outside of the system area than do the libraries in any other system. It is difficult to address equity issues with jurisdictions outside of the system, especially counties operating consolidated public libraries. Counties with consolidated public libraries are not required to compensate municipal libraries in adjacent counties even if a library is located in a municipality that lies partly in the county with the consolidated public library.

In recent years, Outagamie and Waupaca Counties have paid significantly less for library service than have the municipalities operating the libraries. However, new county plans were developed in 2009 that call for the counties to achieve 100% funding of their respective funding formulas by the end of the period covered by the plans, i.e., 2014. 2009 funding levels in Outagamie and Waupaca Counties are at 80.0% and 85.0%, respectively. It is likely that the counties will increase their funding levels to 84% and 88% in 2010. Because county library reimbursements are exempt from county levy limits, it is possible that both counties will be able to achieve their goals of providing 100% funding in 2014.

Good progress has been made toward addressing intersystem equity concerns. In late 2004, OWLS renegotiated its intersystem on-site borrowing agreement with the Nicolet Federated Library System (NFLS). Beginning in 2005, NFLS started paying OWLS for the imbalance in service that occurs between the two systems, primarily as a result of the Marion and Clintonville libraries providing high levels of service to

**ASSURANCES (cont.)**

Shawano County residents.  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.

OWLS libraries and libraries in neighboring systems have elected not to implement the provisions of Act 420.  There has been an agreement among all of the parties that equity is better addressed by current intersystem agreements than it would be by implementing Act 420.  However, it is likely that Waupaca County libraries will begin billing Waushara County.  OWLS will continue to monitor this situation 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.

Financial Position

The system's financial position is more tenuous that it has been in recent years.  The combination of a $25,000 cut in state aids, reduced interest earnings, and increasing health insurance costs has resulted in a very tight budget for 2010.  Fortunately, state aid comprises only about 40% of OWLS operating budget, and OWLS can draw on its fund balance to help support the operating budget.  The 2011 budget is also likely to be very tight, and by then the system will likely have used most of its fund balance designated for future operations.  State funding beyond 2011 will not be known until the state adopts its next biennial budget.  If funding to public library systems should remain flat or be cut in the next state budget, OWLS would need to make significant cuts to its programs and services.

In 2010, nearly half of OWLS operating budget will come from fees paid for services by libraries.  Because OWLS budget is so dependent upon fees for services, the ability to continue providing current services will be threatened if local budget cuts affect the ability of member libraries to pay their fees.  Given the state-imposed tax freeze and the dire state of the economy, local libraries are likely to face funding difficulties during the next few years, and this could have a serious impact on OWLS.  Beginning in 2010 it is likely that the implementation of any new OWLSnet services will be contingent upon the ability of OWLSnet member libraries to pay for them.

No major reductions in services are planned for 2010, but no new programs or services will be added.  The emphasis will be on continuing to offer a strong program of services to member libraries as efficiently and effectively as possible.  The system will continue to look for ways to streamline service delivery and reduce costs, and, of course, it will continue to monitor conditions and be prepared to respond rapidly should changes be necessary.

Describe the planning environment and process under which this and other system plans were developed. (List additional system planning documents with the period covered and attach any planning documents which have not previously been provided to the division.)

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

OWLS conducted two meetings with member library directors in 2009 (April 24 and August 21).  A significant part of each meeting was devoted specifically to discussing issues facing the system and its libraries.  Three Brown Bag Lunch Meetings were held to give OWLS children's librarians an opportunity to share with each other and with system representatives.  Another meeting is scheduled for November.  The

**ASSURANCES (cont.)**

Administrative Advisory Committee of OWLSnet met five times, and another meeting will be held before the end of the year.  Input from the directors, children's librarians, and AAC meetings was considered in the development of the plan.

The 2010 plan has also been shaped by technology planning that occurred previously.  In June 2007, OWLS adopted a technology plan, *OWLS Technology and Resource Sharing Plan:  2007-2010*, and in July 2007 an *OWLSnet Plan:  2007-2010* was adopted.

Perhaps most importantly, the OWLS Board met monthly, holding a number of discussions and taking a variety of actions that contributed to the development of this plan.

Finally, the draft Plan was distributed to member library directors and Fox Valley Library Council member libraries for their comments, and their comments were incorporated into the Plan before adoption by the OWLS Board.

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 **2010**. Indicate, with a check, your system's intent to comply with each system requirement and provide the requested information under each system requirement.

**S.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**

☒ (a) Written agreements to provide, to any resident of the system area, the same library services, on the same terms, that are provided to the residents of the municipality or county that established the member library, except for the group programming preference authorized under s. 43.15 (4) (c) 4., and to provide for the interlibrary loan of materials among all participating public libraries, as evidenced by agreements with those libraries.

☒ A copy of the agreement with a list of all members signing it will be provided to the division by January 15.

**Resource Library Agreement**

☒ (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.

☒ A signed copy of the resource library agreement will be provided to the division by January 15.

**Reference Referral and Interlibrary Loan**

☒ S.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 will continue to maintain a shared database of member library bibliographic records and holdings. The majority of all interlibrary loan transactions occur between libraries using the OWLSnet shared automation system.

OWLS will continue to compensate significant ILL net lenders.

OWLS, in cooperation with Nicolet Federated Library System, will continue to provide OWLSnet members with access to electronic resources including Biography Resource Center, Literature Resource Center, Ancestry Library Edition, Heritage Quest, Mango Languages, Optimal Resume, Learning Express Library, Tumblebooks, WorldCat, and BadgerCat.

OWLSnet holdings will continue to be included in Open WorldCat.

OWLS will continue to contract with Nicolet Federated Library System (NFLS) to serve as the interlibrary loan clearinghouse for all OWLS libraries.

OWLS and NFLS will continue to monitor the sharing of costs associated with NFLS serving as the interlibrary loan clearinghouse for OWLS libraries.

OWLS and its member libraries will continue to participate in the Fox Valley Library Council (FVLC) in order to facilitate resource sharing with other types of libraries in the FVLC area.

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

OWLS will facilitate a planning process resulting in completion of a new OWLSnet plan by May 2010.

OWLS and Appleton Public Library (APL) will assess the merit of participation in AskAway and will implement any recommendations resulting from the assessment.

**ASSURANCES (cont.)**

OWLS, NFLS, and APL will evaluate current database subscriptions and will implement any changes resulting from the evaluation.

OWLS and NFLS will monitor and make recommendations for addressing any resource sharing inequities that may emerge between systems or between member libraries (e.g., changes in library automation system parameters, purchase of high demand materials, changes in fee structure).

OWLS and NFLS will continue to work with Brown County Library to assess methods for other NFLS member libraries to gain more efficient access to the resources of the Brown County Library.

**Inservice Training**

⊠     S.43.24(2)(e) Inservice training for participating public library personnel and trustees.

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

OWLS will offer an appropriate schedule of CE workshops and training classes on topics of interest to librarians, staff, and trustees of member and area libraries.

OWLS will continue to pursue collaborations with other organizations, particularly neighboring library systems, to provide continuing education workshops.

OWLS will continue to provide group training, individual training, or consultation to staff of member libraries in the effective use of electronic information resources, computers, software, and other new technologies.

OWLS will continue to provide information to its member libraries about additional sources for continuing education and training.

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

OWLS will continue to cooperate with Winnefox Library System to produce a quarterly educational newsletter for library trustees.

OWLS will continue to maintain a calendar of CE events and training sessions on the web.

OWLS will continue to validate and maintain librarian certification records.

OWLS will continue using Go To Meeting and Go To Webinar to host online meetings and provide online training to member libraries.

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

OWLS will fill the position of Continuing Education and Outreach Librarian.

**Delivery and Communication**

☒ S. 43.24 (2)(fm) Electronic delivery of information and physical delivery of library materials to participating libraries.

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

OWLS will continue to contract with Waltco, Inc. to provide five-day-a-week delivery service to all member libraries.

OWLS will continue to participate in the statewide delivery service provided by the South Central Library System.

OWLS will continue to provide email accounts and support to staff of all member libraries.

OWLS will continue to utilize email and web postings as its primary methods for rapidly disseminating information to member libraries. In addition to traditional email messages, OWLS will regularly send html email newsletters (e.g., Carpe Hootem) to selected groups of librarians and will post information on web sites in blog format when appropriate.

OWLS will continue to rely on OWLSweb.info and OWLSnet.info, the system web sites, to provide a rich variety of relevant content and links helpful to library staff and trustees.

OWLS will continue to provide web design and hosting services to facilitate the electronic delivery of information from member libraries to their constituents.

OWLS will complete the conversion of member library websites to the Drupal content management platform and will continue providing training to member library staff on maintaining their sites in Drupal.

OWLS will continue to use online calendar software to share information about continuing education, training opportunities, and staff activities.  In addition, OWLS will continue to provide, or will facilitate the use of, calendar software by OWLS libraries for them to disseminate information to their staffs and the public.

OWLS staff will assist member libraries with posting electronic content contained in local databases on their web sites and contributing digital resources to CONTENTdm.

OWLS will continue to encourage and train member library staff to use Google Reader in order to stay current with information posted by the system.


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

OWLS will continue to monitor delivery volume and plan any necessary adjustments or modifications to the delivery service.  Delivery volume will eventually exceed OWLS ability to pay for delivery service, due to the increasing volume of interlibrary loan.

OWLS will begin redesigning OWLSweb.info and OWLSnet.info using Drupal in order to create sites where user experiences vary depending upon their roles, e.g. member library staff members would login and receive different information depending upon their job responsibilities.

**Service Agreements**

☒ S.43.24(2)(g) Service agreements with all adjacent library systems

☒ A copy of the agreement with adjacent systems with a list of all systems signing the agreement will be provided to the division by January 15.

**Other Types of Libraries**

☒ S.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. A copy of the agreement with a list of all signing libraries will be provided to the division by January 15.

☒ Other types of libraries in the system area have had an opportunity to review and comment on the plan.

**Library Technology and Resource Sharing Plan**

☒ S.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.

☒ Member public libraries and other types of libraries in the system area have had an opportunity to review and comment on the plan.

☒ A copy of the written plan, including any revisions and amendments, for library technology and resource sharing is attached to this document or is on file with the division.

**Professional Consultation**

☒ S. 43.24(2)(h) Professional consultant services to participating public libraries.

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

OWLS will continue to provide professional consultant services in a variety of areas including public library administration and finance, library automation, technical services, computer selection and use, web site development, staff development, planning and evaluation, collection development, special needs, and legal issues.

OWLS will continue to provide consulting using a variety of methods: by visits to the member libraries, by meetings held with individuals at the system office, through email and telephone consultation, through interactive computer sessions, and through specially-developed resources on the system's web site, e.g., "Links for Libraries."

OWLS will continue to facilitate the sharing of professional information among system and member library staff by holding regular meetings of staff with similar interests, e.g., brown bag lunch meetings for children and young adult staff, webmeisters meetings, readers' advisory group meetings, directors meetings.

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

OWLS will increase its use of Go To Meeting to provide consulting assistance to member library staff.

**Services to Users With Special Needs**

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

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

OWLS will continue to actively support the work of the Fox Valley Literacy Coalition. The system will continue to support their work by providing grants and services such as printing and use of mailing facilities.

OWLS and NFLS will continue to provide its member libraries with access to Learning Express Library, including GED practice tests and a Spanish language interface to many tests.

OWLS will continue to support the Spanish language interface to InfoSoup.

OWLS and NFLS will continue to make the online language learning program, Mango, available to agencies and residents of both systems.

OWLS and NFLS will continue to work with collaborating libraries and agencies to provide assistance to non-English speakers in learning English by making computers and Rosetta Stone language software available to them.

OWLS and NFLS will continue to offer support to job seekers by providing Optimal Resume and an InfoSoup Jobs and Careers page.

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

OWLS will fill the position of Continuing Education and Outreach Librarian.

OWLS and NFLS will survey member libraries and patrons regarding their use of Mango software in order to determine if the subscription to this software should be continued in future years.

OWLS will use system and LSTA funds to install T-loop hearing systems in the meeting rooms at the Appleton and Waupaca libraries.

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**Other Service Programs**

S.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 programs 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

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

OWLS will continue to contract with the Waupaca Area Public Library for their Youth Librarian to serve as the system's Youth Services Liaison.

OWLS will continue to provide Children's Services News, a blog of news and information about children's services from the Youth Services Liaison.

OWLS will continue to facilitate the interaction of children's librarians at 4 to 6 brown bag lunch meetings each year.

OWLS will continue to provide supplementary materials in support of member library summer library programs, including purchasing a limited amount of the Collaborative SLP materials from Upstart.

OWLS will provide financial support for the purchase of books to be used as SLP reading incentives by member libraries.

OWLS will continue to offer grants for summer library program performers.

OWLS will continue to develop and post summer library program web sites.

OWLS will continue to make gaming stations, including necessary hardware and software, available to member libraries for young adult and/or youth programming.

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

OWLS will work with youth librarians at member libraries to transition the SLP blogs into year around book recommendation and discussion blogs.

OWLS Library Services Manager will work with the Youth Services Liaison and member libraries to assess the system's programs of library services to youth.

## Public Information and Promotion

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

OWLS will continue to provide design and printing services for member libraries and system programs, including bookmarks, resource lists, brochures, signs, forms, and buttons. Member libraries will continue to receive these services for a nominal cost.

OWLS will seek to ensure that all the member libraries, especially those with new directors, are aware of the full range of services available to them in this program.

OWLS will continue to support the statewide library awareness campaign being conducted by the Wisconsin Library Association Foundation.

OWLS and NFLS will continue to provide materials to OWLSnet member libraries to promote the use of InfoSoup.

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

OWLS Graphic Arts Specialist will design an identity package for OWLS using the new OWLS logo.

**Administration**

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

☒ The 2009 system audit will be submitted to the division no later than September 30, 2010.

**Budget**

☒ A copy of your public library system budget by service program category and fund source for the plan year (see attached guidelines) is attached.

| | CERTIFICATION | |
|---|---|---|

**WE, THE UNDERSIGNED, HEREBY 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 **2010**.

| System Director Signature | Date Signed |
|---|---|
| ➤ | |

| System Board President Signature | Date Signed |
|---|---|
| ➤ | |

| | FOR DPI USE LIBRARY SYSTEM PLAN APPROVAL | |
|---|---|---|

| Pursuant to Wis. Statutes, the plan contained herein is:<br><br>☐ Approved<br>☐ Provisionally Approved *See Comments.*<br>☐ Not Approved *See Comments.* | DLTCL Assistant Superintendent Signature<br><br>➤ | Date Signed |

Comments

## PUBLIC LIBRARY SYSTEM 2010
## ANNUAL PROGRAM BUDGET

| Program | 2010 Public Library System Aid | System Aid Carryover and Interest Earned | Other State and Federal Library Program Funds | All Other Income | Total |
|---|---|---|---|---|---|
| **Technology, Reference and Interlibrary Loan*** | | | | | |
| 1. OWLSnet | $183,726 | $0 | $13,800 | $809,959 | |
| 2. OWLS | $100,236 | $0 | $0 | $2,000 | |
| 3.OWLSnet - Server Upgrade | $0 | $0 | $0,. | $105,000 | |
| 4. | | | | | |
| **Program Total** | $283,962 | $0 | $13,800 | $916,959 | $1,214,721 |
| **Continuing Education and Consulting Service*** | | | | | |
| 1. CE and Consulting | $97,608 | $0 | $1,000 | $4,000 | |
| 2. | | | | | |
| **Program Total** | $97,608 | $0 | $1,000 | $4,000 | $102,608 |
| | | | | | |
| **Delivery Services** | $106,348 | $0 | $0 | $48,394 | $154,742 |
| **Library Services to Special Users** | $49,648 | $0 | $8,100 | $0 | $57,748 |
| **Library Collection Development** | | | | | $0 |
| **Direct Payment to Members for Nonresident Access** | $0 | $0 | $0 | $2,117,259 | $2,117,259 |
| **Direct Nonresident Access Payments Across System Borders** | $0 | $0 | $0 | $204,302 | $204,302 |
| **Library Services to Youth** | $48,425 | $0 | $0 | $0 | $48,425 |
| **Public Information** | $47,718 | $0 | $0 | $11,500 | $59,218 |
| **Administration** | $20,434 | $6,000 | $0 | $99,000 | $125,434 |
| **Subtotal** | $272,573 | $6,000 | $8,100 | $2,480,455 | $2,767,128 |
| **Other System Programs** | | | | | |
| 1. Designated for future ILS upgrade - see attached sheet | $0 | $0 | $0 | $74,114 | $74,114 |
| 2. Designated for 2011 operating budget - see attached sheet | $0 | $0 | $0 | $78,826 | $78,826 |
| **Program Total** | $0 | $0 | $0 | $152,940 | $152,940 |
| **Grand Totals** | $654,143 | $6,000 | $22,900 | $3,554,354 | $4,237,397 |

* These programs may be divided into subprograms at the discretion of the system. If choosing not to use subprograms, enter amounts on line 1.

**Outagamie Waupaca Library System**
**2010 Budget**
Adopted 10/15/09

| | 2009 Budget 06/18/09 | 2010 Budget 10/15/09 | Change | % Change |
|---|---|---|---|---|
| **Income** | | | | |
| State Aid | $679,155.00 | $654,143.00 | ($25,012.00) | -3.7% |
| Outagamie County | $1,204,967.00 | $1,342,794.00 | $137,827.00 | 11.4% |
| Waupaca County | $724,949.00 | $794,465.00 | $69,516.00 | 9.6% |
| Intersystem Income | $221,118.00 | $243,697.00 | $22,579.00 | 10.2% |
| Automation Income | $795,423.00 | $805,959.00 | $10,536.00 | 1.3% |
| Federal LSTA Grants | $46,987.00 | $22,900.00 | ($24,087.00) | -51.3% |
| Interest Income | $12,000.00 | $11,000.00 | ($1,000.00) | -8.3% |
| Printing Income | $10,000.00 | $7,500.00 | ($2,500.00) | -25.0% |
| Miscellaneous Income | $3,000.00 | $2,000.00 | ($1,000.00) | -33.3% |
| | -------------------- | -------------------- | -------------------- | |
| Total Revenue | $3,697,599.00 | $3,884,458.00 | $186,859.00 | 5.1% |
| Transfer from Fund Balance | $101,026.00 | $200,000.00 | $98,974.00 | 98.0% |
| | -------------------- | -------------------- | -------------------- | |
| Total Revenue & Transfers | $3,798,625.00 | $4,084,458.00 | $285,833.00 | 7.5% |
| | ============= | ============= | ============= | |
| | | | | |
| **Expenditures** | | | | |
| ADMINISTRATION | | | | |
| 300-03 Salaries | $53,752.00 | $57,303.00 | $3,551.00 | 6.6% |
| 301-03 Payroll Taxes | $4,100.00 | $4,382.00 | $282.00 | 6.9% |
| 302-03 Fringe Benefits | $32,575.00 | $36,449.00 | $3,874.00 | 11.9% |
| 305-03 Facilities | $3,500.00 | $3,500.00 | $0.00 | 0.0% |
| 311-08 Telephone | $2,600.00 | $2,600.00 | $0.00 | 0.0% |
| 312-03 Supplies | $800.00 | $800.00 | $0.00 | 0.0% |
| 320-03 Equipment | $1,200.00 | $500.00 | ($700.00) | -58.3% |
| 321-03 Equipment Service | $800.00 | $300.00 | ($500.00) | -62.5% |
| 325-03 Meeting and Travel | $2,300.00 | $2,800.00 | $500.00 | 21.7% |
| 330-03 Professional Services | $11,000.00 | $11,000.00 | $0.00 | 0.0% |
| 332-03 Insurance | $3,600.00 | $3,600.00 | $0.00 | 0.0% |
| 363-03 Prof. Memberships | $2,000.00 | $1,200.00 | ($800.00) | -40.0% |
| 375-03 Miscellaneous | $31,500.00 | $1,000.00 | ($30,500.00) | -96.8% |
| | -------------------- | -------------------- | -------------------- | |
| | $149,727.00 | $125,434.00 | ($24,293.00) | -16.2% |
| TECHNOLOGY-REFERENCE-INTERLOAN | | | | |
| OWLS | | | | |
| 300-11 Salaries | $74,843.00 | $48,932.00 | ($25,911.00) | -34.6% |
| 301-11 Payroll Taxes | $5,725.00 | $3,743.00 | ($1,982.00) | -34.6% |
| 302-11 Fringe Benefits | $31,236.00 | $19,711.00 | ($11,525.00) | -36.9% |
| 305-11 Facilities | $3,500.00 | $3,500.00 | $0.00 | 0.0% |
| 312-11 Supplies | $500.00 | $500.00 | $0.00 | 0.0% |
| 320-11 Equipment | $1,500.00 | $1,500.00 | $0.00 | 0.0% |
| 325-11 Meeting and Travel | $2,800.00 | $2,800.00 | $0.00 | 0.0% |
| 326-11 Training/Consulting | $1,000.00 | $1,000.00 | $0.00 | 0.0% |
| 330-11 Software | $1,000.00 | $1,000.00 | $0.00 | 0.0% |
| 342-11 Online Databases | $12,900.00 | $7,300.00 | ($5,600.00) | -43.4% |
| 349-11 Digitization Project | $3,100.00 | $0.00 | ($3,100.00) | -100.0% |
| 373-11 FOCOL Participation | $4,000.00 | $0.00 | ($4,000.00) | -100.0% |
| 374-11 FVLC Participation | $1,000.00 | $750.00 | ($250.00) | -25.0% |
| 375-11 Statewide Projects | $6,248.00 | $6,500.00 | $252.00 | 4.0% |
| 378-11 Lender Compensation | $4,000.00 | $5,000.00 | $1,000.00 | 25.0% |
| | -------------------- | -------------------- | -------------------- | |
| Subtotal | $153,352.00 | $102,236.00 | ($51,116.00) | -33.3% |

|  | 2009 Budget | 2010 Budget | Change | % Change |
|---|---|---|---|---|
| TECHNOLOGY-REFERENCE-ILL | | | | |
| OWLSnet | | | | |
| 300-05 Salaries | $314,950.00 | $335,923.00 | $20,973.00 | 6.7% |
| 301-05 Payroll Taxes | $24,094.00 | $25,698.00 | $1,604.00 | 6.7% |
| 302-05 Fringe Benefits | $118,612.00 | $130,187.00 | $11,575.00 | 9.8% |
| 305-05 Facilities | $7,000.00 | $7,000.00 | $0.00 | 0.0% |
| 311-05 Telephone | $3,000.00 | $3,000.00 | $0.00 | 0.0% |
| 312-05 Supplies | $11,000.00 | $9,000.00 | ($2,000.00) | -18.2% |
| 313-05 Telecommunications | $65,500.00 | $69,600.00 | $4,100.00 | 6.3% |
| 314-05 Borrowers' Card Supplies | $7,500.00 | $5,000.00 | ($2,500.00) | -33.3% |
| 315-05 Printing & Promotion | $7,700.00 | $4,200.00 | ($3,500.00) | -45.5% |
| 320-05 Microcomputer Equipment | $3,500.00 | $1,500.00 | ($2,000.00) | -57.1% |
| 321-05 Microcomputer Repair | $1,000.00 | $1,000.00 | $0.00 | 0.0% |
| 325-05 Meeting and Travel | $8,000.00 | $8,000.00 | $0.00 | 0.0% |
| 326-05 Training/Consulting | $3,500.00 | $3,000.00 | ($500.00) | -14.3% |
| 330-05 Software | $6,500.00 | $6,500.00 | $0.00 | 0.0% |
| 340-05 Resource Library | $21,000.00 | $21,000.00 | $0.00 | 0.0% |
| 342-05 Online Databases | $91,500.00 | $90,127.00 | ($1,373.00) | -1.5% |
| 343-05 Internet Access | $42,450.00 | $42,450.00 | $0.00 | 0.0% |
| 345-05 OCLC Charges | $90,000.00 | $90,000.00 | $0.00 | 0.0% |
| 348-05 Digitization | $0.00 | $3,100.00 | $3,100.00 | - |
| 349-05 Enhanced Content | $15,200.00 | $15,200.00 | $0.00 | 0.0% |
| 350-05 System Development | $36,500.00 | $5,000.00 | ($31,500.00) | -86.3% |
| 352-05 System Hardware | $19,600.00 | $10,000.00 | ($9,600.00) | -49.0% |
| 353-05 Network Hardware | $1,500.00 | $11,000.00 | $9,500.00 | 633.3% |
| 354-05 System Maintenance | $105,000.00 | $110,000.00 | $5,000.00 | 4.8% |
| Subtotal | $1,004,606.00 | $1,007,485.00 | $2,879.00 | 0.3% |
| Total | $1,157,958.00 | $1,109,721.00 | ($48,237.00) | -4.2% |
| | | | | |
| CONTINUING EDUCATION - CONSULTING | | | | |
| 300-10 Salaries | $39,982.00 | $49,385.00 | $9,403.00 | 23.5% |
| 301-10 Payroll Taxes | $3,059.00 | $3,778.00 | $719.00 | 23.5% |
| 302-10 Fringe Benefits | $14,684.00 | $22,445.00 | $7,761.00 | 52.9% |
| 305-10 Facilities | $7,000.00 | $7,000.00 | $0.00 | 0.0% |
| 324-10 CE Program Expenses | $10,000.00 | $7,000.00 | ($3,000.00) | -30.0% |
| 325-10 Travel | $4,000.00 | $4,000.00 | $0.00 | 0.0% |
| 326-10 CE Scholarships | $6,000.00 | $4,000.00 | ($2,000.00) | -33.3% |
| 327-10 Staff Development | $5,000.00 | $4,000.00 | ($1,000.00) | -20.0% |
| 354-10 Professional Serials | $1,250.00 | $750.00 | ($500.00) | -40.0% |
| 360-10 Professional Books | $750.00 | $250.00 | ($500.00) | -66.7% |
| | $91,725.00 | $102,608.00 | $10,883.00 | 11.9% |
| DELIVERY | | | | |
| 300-08 Salaries | $41,122.00 | $41,107.00 | ($15.00) | 0.0% |
| 301-08 Payroll Taxes | $3,146.00 | $3,145.00 | ($1.00) | 0.0% |
| 302-08 Fringe Benefits | $15,284.00 | $14,590.00 | ($694.00) | -4.5% |
| 305-08 Facilities | $7,000.00 | $7,000.00 | $0.00 | 0.0% |
| 310-08 Postage | $1,500.00 | $1,500.00 | $0.00 | 0.0% |
| 312-08 Supplies | $1,500.00 | $1,500.00 | $0.00 | 0.0% |
| 363-08 Contractual Services | $80,000.00 | $85,000.00 | $5,000.00 | 6.3% |
| 365-08 Equipment Lease | $1,100.00 | $900.00 | ($200.00) | -18.2% |
| | $150,652.00 | $154,742.00 | $4,090.00 | 2.7% |

|  | 2009 Budget | 2010 Budget | Change | % Change |
|---|---|---|---|---|
| **SPECIAL USER SERVICES** | | | | |
| 300-13 Salaries | $11,570.00 | $25,428.00 | $13,858.00 | 119.8% |
| 301-13 Payroll Taxes | $885.00 | $1,945.00 | $1,060.00 | 119.8% |
| 302-13 Fringe Benefits | $4,227.00 | $12,275.00 | $8,048.00 | 190.4% |
| 338-13 Literacy Support | $5,000.00 | $5,000.00 | $0.00 | 0.0% |
| 339-13 Materials and Projects | $13,850.00 | $13,100.00 | ($750.00) | -5.4% |
|  | $35,532.00 | $57,748.00 | $22,216.00 | 62.5% |
| **PUBLIC INFORMATION - PROMOTION** | | | | |
| 300-15 Salaries | $26,698.00 | $17,284.00 | ($9,414.00) | -35.3% |
| 301-15 Payroll Taxes | $2,042.00 | $1,322.00 | ($720.00) | -35.3% |
| 302-15 Fringe Benefits | $9,394.00 | $6,112.00 | ($3,282.00) | -34.9% |
| 305-15 Facilities | $7,000.00 | $7,000.00 | $0.00 | 0.0% |
| 312-15 Supplies | $17,000.00 | $10,000.00 | ($7,000.00) | -41.2% |
| 320-15 Equipment | $7,000.00 | $7,000.00 | $0.00 | 0.0% |
| 321-15 Equipment Maintenance | $1,800.00 | $1,800.00 | $0.00 | 0.0% |
| 330-15 Software | $500.00 | $500.00 | $0.00 | - |
| 354-15 Special Promotions | $2,300.00 | $1,200.00 | ($1,100.00) | -47.8% |
| 364-15 Commercial Work | $8,000.00 | $7,000.00 | ($1,000.00) | -12.5% |
|  | $81,734.00 | $59,218.00 | ($22,516.00) | -27.5% |
| **YOUTH SERVICES** | | | | |
| 300-06 Salaries | $16,671.00 | $23,509.00 | $6,838.00 | 41.0% |
| 301-06 Payroll Taxes | $1,275.00 | $1,798.00 | $523.00 | 41.0% |
| 302-06 Fringe Benefits | $6,255.00 | $10,118.00 | $3,863.00 | 61.8% |
| 312-06 Supplies & Materials | $2,800.00 | $2,000.00 | ($800.00) | -28.6% |
| 326-06 SLP Program Grants | $8,500.00 | $8,500.00 | $0.00 | 0.0% |
| 327-06 Liaison | $2,500.00 | $2,500.00 | $0.00 | 0.0% |
| 340-07 Big Books Collection | $500.00 | $0.00 | ($500.00) | -100.0% |
|  | $38,501.00 | $48,425.00 | $9,924.00 | 25.8% |
| **ACCESS PAYMENTS** | | | | |
| County Service | | | | |
| 400-22 Appleton | $700,009.00 | $806,517.00 | $106,508.00 | 15.2% |
| 405-22 Black Creek | $56,874.00 | $52,010.00 | ($4,864.00) | -8.6% |
| 410-22 Clintonville | $118,819.00 | $116,747.00 | ($2,072.00) | -1.7% |
| 415-22 Fremont | $18,169.00 | $21,159.00 | $2,990.00 | 16.5% |
| 420-22 Hortonville | $56,123.00 | $57,852.00 | $1,729.00 | 3.1% |
| 425-22 Iola | $64,937.00 | $67,466.00 | $2,529.00 | 3.9% |
| 430-22 Kaukauna | $87,815.00 | $96,719.00 | $8,904.00 | 10.1% |
| 435-22 Kimberly-Little Chute | $129,856.00 | $149,170.00 | $19,314.00 | 14.9% |
| 440-22 Manawa | $69,087.00 | $72,203.00 | $3,116.00 | 4.5% |
| 445-22 Marion | $21,196.00 | $21,951.00 | $755.00 | 3.6% |
| 450-22 New London | $143,997.00 | $168,036.00 | $24,039.00 | 16.7% |
| 455-22 Scandinavia | $12,949.00 | $14,396.00 | $1,447.00 | 11.2% |
| 460-22 Seymour | $52,440.00 | $57,663.00 | $5,223.00 | 10.0% |
| 465-22 Shiocton | $24,310.00 | $23,654.00 | ($656.00) | -2.7% |
| 470-22 Waupaca | $293,500.00 | $329,970.00 | $36,470.00 | 12.4% |
| 475-22 Weyauwega | $33,792.00 | $37,819.00 | $4,027.00 | 11.9% |
| 480-22 Oneida | $26,043.00 | $23,927.00 | ($2,116.00) | -8.1% |
| Subtotal | $1,909,916.00 | $2,117,259.00 | $207,343.00 | 10.9% |

|  | 2009 Budget | 2010 Budget | Change | % Change |
|---|---|---|---|---|
| Intersystem Service |  |  |  |  |
| 400-23 Appleton | $94,366.00 | $109,558.00 | $15,192.00 | 16.1% |
| 405-23 Black Creek | $0.00 | $0.00 | $0.00 | - |
| 410-23 Clintonville | $11,167.00 | $11,245.00 | $78.00 | 0.7% |
| 415-23 Fremont | $1,937.00 | $2,895.00 | $958.00 | 49.5% |
| 420-23 Hortonville | $0.00 | $0.00 | $0.00 | - |
| 425-23 Iola | $0.00 | $0.00 | $0.00 | - |
| 430-23 Kaukauna | $29,303.00 | $32,077.00 | $2,774.00 | 9.5% |
| 435-23 Kimberly-Little Chute | $34,617.00 | $39,912.00 | $5,295.00 | 15.3% |
| 440-23 Manawa | $0.00 | $0.00 | $0.00 | - |
| 445-23 Marion | $7,927.00 | $6,510.00 | ($1,417.00) | -17.9% |
| 450-23 New London | $0.00 | $0.00 | $0.00 | - |
| 455-23 Scandinavia | $0.00 | $0.00 | $0.00 | - |
| 460-23 Seymour | $0.00 | $0.00 | $0.00 | - |
| 465-23 Shiocton | $0.00 | $0.00 | $0.00 | - |
| 470-23 Waupaca | $2,063.00 | $2,105.00 | $42.00 | 2.0% |
| 475-23 Weyauwega | $0.00 | $0.00 | $0.00 | - |
| 480-23 Oneida | $0.00 | $0.00 | $0.00 | - |
| Subtotal | $181,380.00 | $204,302.00 | $22,922.00 | 12.6% |
| Total | $2,091,296.00 | $2,321,561.00 | $230,265.00 | 11.0% |
|  |  |  |  |  |
| SUMMARY |  |  |  |  |
| Administration | $149,727.00 | $125,434.00 | ($24,293.00) | -16.2% |
| T-R-I: OWLSnet | $1,004,606.00 | $1,007,485.00 | $2,879.00 | 0.3% |
| T-R-I: OWLS | $153,352.00 | $102,236.00 | ($51,116.00) | -33.3% |
| Continuing Ed. - Consulting | $91,725.00 | $102,608.00 | $10,883.00 | 11.9% |
| Delivery | $150,652.00 | $154,742.00 | $4,090.00 | 2.7% |
| Special User Services | $35,532.00 | $57,748.00 | $22,216.00 | 62.5% |
| Public Information - Promotion | $81,734.00 | $59,218.00 | ($22,516.00) | -27.5% |
| Youth Services | $38,501.00 | $48,425.00 | $9,924.00 | 25.8% |
| Subtotal | $1,705,829.00 | $1,657,896.00 | ($47,933.00) | -2.8% |
| Access Payments | $2,091,296.00 | $2,321,561.00 | $230,265.00 | 11.0% |
| Capital | $1,500.00 | $105,000.00 | $103,500.00 | 6900.0% |
|  | $3,798,625.00 | $4,084,457.00 | $285,832.00 | 7.5% |
|  |  |  |  |  |
| Summary of Personnel Costs |  |  |  |  |
| Salaries | $579,588.00 | $598,871.00 | $19,283.00 | 3.3% |
| Payroll Taxes | $44,326.00 | $45,811.00 | $1,485.00 | 3.4% |
| Fringe Benefits | $232,267.00 | $251,887.00 | $19,620.00 | 8.4% |
| Total | $856,181.00 | $896,569.00 | $40,388.00 | 4.7% |

**Explanation of Fund Balance Designation**
Outagamie Waupaca Library System
October 15, 2009


December 31, 2008 Fund Balance                                   $469,793

Designation of December 31, 2008 Fund Balance
- Reserved for prepaid items                                        $15,827
- Reserved for future OWLSnet upgrades*                   $179,117
- Reserved for future operating budgets**                   $274,852


Incorporation of 2008 Fund Balance into 2009 Budget
- Transfer from future operations fund**                     ($101,026)


Estimated December 31, 2009 Fund Balance              $352,940

Designation of Estimated 2009 Fund Balance
- Reserved for future OWLSnet upgrades*                   $179,117
- Reserved for future operating budgets**                   $173,826


Incorporation of 2009 Fund Balance into 2010 Budget
- Transfer from OWLSnet upgrade fund* – server        ($105,000)
- Transfer from future operations fund**                      ($95,000)


Estimated December 31, 2010 Fund Balance              $152,940

Designation of Estimated 2010 Fund Balance
- Reserved for future OWLSnet upgrades*                   $74,114
- Reserved for future operating budgets**                   $78,826



*OWLSnet upgrade fund – This fund is used to purchase replacement servers and network equipment necessary for the operation of the automation consortium.

**Future operations fund – This fund is used to supplement annual revenues in developing the operating budget.  This fund has been used to offset declining interest earnings and state aid reductions, and the availability of this fund has been helpful in dealing with significant health insurance premium increases.  It is anticipated that the entire 12/31/10 balance will be incorporated into the 2011 operating budget.