

## WINNEFOX LIBRARY SYSTEM LONG-RANGE PLANNING FOCUS GROUPS

Five focus groups were held with library directors in each of the counties in Winnefox Library System. These were conducted from August 7 to August 30, 2007. A total of 26 libraries were represented in the discussions. Two participants were representing library directors. Four member libraries were not represented.

The same interview guide was used for all the focus groups. Information was gathered on local needs, Winnefox services for local libraries, and strengths and challenges for Winnefox Library System. The interviews were conducted by Debra Wilcox Johnson, Johnson & Johnson Consulting. Notetakers were Lucille Bledsoe and Sandra Herfel.

This document summarizes the key themes that emerged from the focus groups. These themes represent widely held viewpoints across groups. In addition, the report identifies issues that were discussed by multiple individuals, but not across all groups. Quotations are used to illustrate the key points in the summary.

### LOCAL NEEDS

Several communities are not experiencing growth in the municipality. Growth tends to be in the townships. Librarians described "many changes in the community." There are "more special needs because of an aging population." Increased diversity means changing needs (and varying degrees of acceptance in community). "Our community has more migrant workers, especially in the summer, and they have special needs." The senior population is increasing in several communities. Reports of "younger, educated people leaving the area" were shared. "Residents are more likely to have little or no education and are struggling with low income." In tourist communities, "the tourists are much more affluent than the residents."

The good news for local libraries is user satisfaction. "New people coming into the library are pleased." Some described the "library as the social center" in the community. "It is turning into what patrons want." "The more

we do, the more they'll come in and support us." "Retired people are delighted with us."

With that customer satisfaction comes increased demand for more materials and services and for a greater range of services. Getting materials in sufficient quality and quantity and meeting demand for multiple formats is a challenge. "Circulation has been going crazy." "People want more - bigger and better." There is "huge demand for AV collections." "Summer visitors demand a lot from local libraries because they are used to getting it from where they live." "They expect the same benefits they have in their home towns." Managing this demand for services is a significant challenge. "We just remodeled work areas to handle the flow." "Volunteers doing a lot of shelving." How will the libraries adjust to meet the ongoing demand for service?

Meeting that demand is challenged by lack of adequate funding. While this may not be a new message, there is evidence that for many communities it is becoming increasingly difficult to deliver what customers need. "Many downtowns are dying." "There aren't any new businesses." Schools are closing and merging in some areas because of a decrease of families. "All city departments are taking a hit because of money problems." The economies vary in the counties, but there were limited reports of growth. "No jobs to speak of." "People commute out of the county for jobs." No matter the locality, however, most libraries report struggling with the need for more resources to meet local needs. As one person concluded, the "top thing will be monies to keep the quality of service, materials, and staff."

Level or reduced staffing is linked to funding needs. People described their libraries as a "one-person show." "I have two part-time employees, which are never here when I am here." A one-person staff means it is hard to do all the work, especially when "the library is open 24 hours a week, and I only get paid for 24 hours a week." All talked about needing to prioritize and "having a lot to learn." Even in larger libraries, this is an issue. Less staff or level staff with increased demand and range of services is typical in Winnefox member libraries.

Space needs were mentioned by several of the librarians. Even those in newer buildings already recognize the need to plan for more space in the

near future. Collection and technology needs are driving the need for space. "With old buildings we need to perform creative tweaking." "All staff need to be creative because of space issues."

A key challenge is "keeping up with technology - the latest and the greatest." Knowing what the future will bring in technology is a concern for many. "What is the best to use, how to keep it running, and where to put it" are the primary issues. Meeting demand for Internet access is an ongoing concern. "We need management technologies and to keep staff trained in technology." "We can't afford to keep up with technologies." "The library can't afford and find space for technologies." "Keeping ourselves and staff trained in technology" is an ongoing concern. "The customers know more than we do in the technology field."

Promoting the library is a big part of communicating what is available and what is needed. "My time is spent promoting." Getting the word out to all media is an ongoing effort. "We need help making the city, village, and town boards understand about budgets. "The library doesn't have a formal organization of Friends, which I think would be beneficial." "Community involvement is needed; there are not enough volunteers." "Keeping volunteers, especially in the summer" is important to help staff libraries.

## TECHNOLOGY

Many librarians in the system attribute their progress in technology to Winnefox. "We are one step ahead on technology." Wireless access is popular with customers. As people move from city to rural areas, they "are flabbergasted by the wireless" access. The system also maintains the security firewall, which is important to all the libraries.

The technology assistance is highly valued by the member libraries. Kudos were repeatedly given for the quality of service and helpfulness and responsiveness of staff. "The tech help is invaluable." "We have the tech people phone numbers memorized." "The tech department is always there." "If it is a phone call, it is a matter of minutes" before the problem is solved. "We like it when there is a human being at the other end." "Problems solved that day are very important to us." "They are willing to do special projects." The tech assistance is used by all sized libraries, although the larger

libraries also have added IT staff. "I think Winnefox tech people are a greater benefit to small libraries."

Among the small libraries, the most frequently cited need was for more time available for the tech staff to come regularly to each library to assist with questions, training, and trouble shooting. It would be "helpful if every library got two site visits a year from the IT people." "On-site assistance is invaluable." "I would prefer one-on-one because I am a hands-on person." "We need on-site visits occasionally to check on things." "If they come on site, they check on other things." Site visits are good for other staff since "they don't generally go to workshops." Assistance on developing a replacement plan for computers was a suggested service from Winnefox.

When upgrades are done, the librarians appreciate "clear step-by-step instructions." Several library directors desire more updates on emerging technologies. The new system committee on emergent technologies is seen as a positive move.

#### WINNEFOX AUTOMATED LIBRARY SYSTEM (WALS)

The shared automated system has been a positive development for library users and has had a positive effect on circulation. "The patrons' attitudes have changed. It isn't negative. If the local library doesn't have it, they know they can get it." "We can go outside the system, and patrons are happy we can go global-wide." Librarians report a lot more remote use from home. The system is "user friendly" and WALS "took our suggestions" to improve it. The sense is that there are "fewer and fewer things we have to go outside the system for." In spite of concerns raised about WALS, there is agreement on its positive impact on member libraries and the quality of service for customers.

The WALS staff has generally been responsive to questions related to the system. Several noted that "they do not make you feel dumb." This perspective varies library to library, but the overall impression is positive. Some trainers are better than others. There was interest expressed by some groups for more training to follow-up on what is received initially. Easy to follow "written steps for generating different reports" was requested, as

well as updates to the manual. "We need a workshop for reports from WALs - maybe annually."

There is agreement that the decision making process related to the shared automation system is troublesome. "The governance did not grow with the system." The smaller libraries are less involved in the process. Several wish there could be a decision making process that sometimes would use a "Senate model" (equal votes) instead of the "House of Representatives" model which is based on the library's size (and cost for participation). "Now we are like the House of Representatives. We want to be like the Senate." It is "important to allow for equal voice from all libraries." "It hasn't evolved enough; we were ignored for so long." "Small libraries are left out of the loop. We want to know what is going on with the executive committee." The larger libraries also noted that in some cases they "did not know everything that is going on in WALs."

There is recognition that an effort is underway to change the governance structure of WALs. Most participants acknowledged the difficulty of this process. "The governance issues can't go anywhere until the financial issues are solved." A few said it was still not clear who makes the decisions and are concerned that Oshkosh Public Library is the biggest player in that decision-making process. Some members recognize that since the larger libraries are paying the most, this has some effect on the governance. Yet for the smaller libraries, the amount paid is a significant commitment in the context of the library's total budget.

There has been improvement in the management of the WALs meetings, making them more productive and efficient. The agenda used to arrive just a day before and often documents were distributed at meetings. Both things prevented people from preparing ahead of time. This "has improved" since the new director and "must continue." The number of meetings can be a problem, but participants feel like "it is back on track." "They are important. I will always be there." "There's a lot of 'a-ha' moments at these meetings" when people learn what is available and how to do things a different way. A few librarians reported that the smaller libraries are getting an opportunity to give input. Small libraries who attend the meetings "bring the on-the-desk point of view."

It is not always clear about who is responsible for what things at Winnefox related to technology. "It is confusing who is who. We need a list of who does what and who we call for certain things and questions." There is confusion about the shared positions related to WALs and the role of Oshkosh staff. People sometimes were not sure they should be asking Oshkosh staff about problems. In most of the groups, there was exchange of information about who to contact for what related to technology and WALs.

There is a strong desire to dramatically improve the presentation of the WALs budget and to detail the costs for each element of service, especially for databases. The financial information on WALs was described as "almost indecipherable," "very complicated," and "obtuse." Across the groups, there were questions about what exactly is being paid for with the participation fee. "We need accountability." There is a perceived unwillingness to improve the format of the financial information related to WALs.

While the Winnefox members appreciate the value the shared automation system, there is an underlying concern about the ongoing cost to participate in the system. There were questions raised about the cost of participation. "This is a cost in the budget we have no control over. It is hard to explain to our board." This concern is exacerbated when the WALs financial information is hard to understand. It also was not clear if the WALs payment includes web site development (or to what extent). There were several who felt the budget/cost information about WALs lacks clarity.

As is the case nationally, Winnefox members know that electronic databases are useful, but the amount of use across libraries may not justify the total cost of these resources. Some librarians admitted they "are not sure what it is and how to use it." "We don't have time to use them." Some libraries are not aware of all the databases or comfortable using them. "If I can't access it, my patrons won't access it."

In order to determine the cost benefit of the databases, libraries need to know how much is being invested. "Until recently, we never had a voice in it" [choosing databases]. "They have meetings, but I don't have time." "They do send us new links they want us to evaluate, but we don't have time." "I don't

have anyone to send." "Lots of money is spent on these. We need a breakdown."

## GRAPHIC AND PRINTING SERVICES

Winnefox-designed graphic materials were evident at the libraries visited for the focus groups. The majority of members place a high value on graphic and printing services. While some choose to create materials in-house, the interviews confirmed the importance of this system service. There are clear concerns, however, about the management of the service. Three opinions were consistently expressed - a need for an online project queue, email responses on requests, and an opportunity to proof materials for printing.

Not knowing where the library's project is in the project queue concerns users of this service. Related to this is a sense by some that Oshkosh Public Library projects take precedence. An online project list would make it easier to monitor graphic requests and document how project requests are prioritized. A few reported "inconsistency on who gets what and when." Business cards and letterhead have been requested but not delivered by a few libraries. "These things are promoted as free, but I did not receive them even after a year."

There is no acknowledgement of receipt of requests. An automated or simple email to confirm receipt would reduce uncertainty and could provide an opportunity for graphic services to indicate when the work might be completed. "With no response, I don't know if they have read the email, are taking care of it, or what." "Just any kind of response stating they received the email would be great." A few choose to call, since they "get an immediate response." This issue is related to the desire for an online project queue.

Librarians need an opportunity to proofread the material before it is printed. Errors have been increasing, and the librarians want to take responsibility for checking the work. "When graphics are requested, many errors are found ... because they are rushing it." "We should be able to proof it before the final print - be able to sign off on it."

Participants were very clear that these comments were not negative reactions to the person doing the work. "She does go above and beyond." Most recognized that it is likely a matter of too much work for the amount of time available for the position. "Work load is an issue." Some libraries have opted to do most of their graphics work in-house because of these problems, including timeliness of completion of requested items. With increased desktop publishing capabilities, a discussion of what materials should be produced in-house and what should be created through graphic services might make sense.

## PUBLIC RELATIONS

There was limited discussion of the system's role in helping libraries with promotion. When promotional materials are distributed (e.g., for special themes like Banned Books Week), the system "needs to let us know ahead of time." The public relations approach is "not cohesive." "All they would have to do is send an email letting use know posters are coming" or send a quarterly alert. There was appreciation for the system's efforts to help with summer library programming. There was limited discussion of a stronger role for the system in promotion. Instead, additional resources in graphic and printing services were seen as a priority.

## WINNEFOX COOPERATIVE TECHNICAL SERVICE (WCTS)

WCTS is an important service for those libraries that use it. There is "no way we could replace it." "I would absolutely hate to lose that service." "When we had to take cuts, we did it at the local level rather than lose WCTS." "If they can fix it, they will."

Improvement in billing is desired by some. "At least give us a general idea of how much the bill will be when ordering" (e.g., estimated discount). "Libraries are just holding their breath until the bill comes in." In one group, all agreed they would like a monthly, summary bill rather than "a lot of little bills."

The selection list is helpful for the smaller libraries, although there are mixed reactions to the book selection meetings. The desire is for more opportunities to use this time for CE related to collections. In addition, a

better system for distributing free materials at these meetings needs to be established. This could be done by limiting the number of things to be taken by each person for the first few hours of the event.

## CONTINUING EDUCATION

Continuing education (CE) activities were not mentioned frequently, but when asked specifically about CE (other than WALs training), there was agreement that the system did a good job of gathering input on what topics were of interest to members. Winnefox "always asks every year what we want." Generally positive reviews were received about workshops, although naturally some were seen as better than others. (No consistent pattern emerged on which workshops were the best.) "Some are helpful, some are mediocre." One group was more critical of the workshops, suggesting the use of more outside presenters (non-system).

Winnefox members do take advantage of workshops from other systems; for the most part, Winnefox's workshops compared favorably. "Training is comparable with those outside the system - some better, some less." OWLS was cited as a source of good training. "They do great things that make you feel great and valuable."

The training can be "very overwhelming," especially for new directors. "A lot of information is given at once." "Maybe smaller portions at a time" would be better. "Too much training is thrown at you at one time." The conclusion among the participants was that the training offered was enough to meet recertification needs. Some felt the need for more training related to WALs. More training on the databases and more easy, step-by-step guides for using the databases were mentioned as desirable. Depending on the location of the library, some expressed a desire for more workshops in locations other than Oshkosh.

One specific suggestion for improvement was that the system provide the description of the workshop for the recertification attendance forms. "If you're attending a system workshop, why not write out that description for us?" This time-saving approach is used by other systems. Another suggestion was that mileage be paid for the library, not just the director.

In some cases, it would be better for a staff person to attend. "Pay for mileage for one car per library" rather than just the director's mileage.

## OTHER SERVICES

Very little was mentioned about interlibrary services. Delivery was mentioned a few times, mostly in response to the proposed five-day-a-week delivery schedule. Those who mentioned delivery were generally positive about the idea of five-day delivery, although a few did not see this as a priority.

The system staff received kudos for its ongoing effort to get adequate county funding for libraries. Winnefox provides "valuable help in getting county funding" and "doing that on a coordinated basis." Two groups highlighted how helpful the system is with preparing the annual report. "It's nice to have reports and statistics for the annual report."

For those libraries that participate, the system facilitation of rotating collections (large print, audiobooks, and DVDs) is very important. It "expands the purchase power" for participants.

Concerns were expressed in most of the groups about cataloging services. Stories of non-response to questions and requests were common. "I sent six videos to catalog months ago, and they are still not available." "There are no responses to any calls." "We send only the cover of items to be cataloged because they sit on them too long." "We are tired of filling out a form to report mistakes. We can report mistakes, but have no feedback on if it is fixed." Some have stopped using cataloging, and for several it was seen as a last resort. "They have to take the time to let the libraries know they received calls and emails and that they are working on the stuff."

## COUNTY REIMBURSEMENT

The 2008 county reimbursement clearly a concern among the librarians, especially as it relates to payments among counties within Winnefox. Across the groups, there is a belief that Winnefox has somehow "dropped the ball" on this, although it is hard to get a clear picture of how things could have happened differently. "They should be looking out for use within the system

and in the state." "They should have been on top of this." The general sense is that the system should have worked to negotiate this differently among the Winnefox counties. "I do wish we could convince everyone in Winnefox not to charge each other."

## JOINT WINNEFOX/OSHKOSH PUBLIC LIBRARY ADMINISTRATION

While the Winnefox long-range plan was the motivation for these interviews, the controversy over separating Winnefox from Oshkosh Public Library in 2005/2006 is an issue of interest. This was not raised as a discussion point by the interviewer. It needed to be introduced by a member of the focus group. The structure of Winnefox was mentioned in all of the groups, but with varying degrees of intensity. The perspectives on this issue were along two dimensions: 1.) not a significant issue for local libraries and 2.) necessary to study and change the joint administration.

For a majority of participants, the shared Winnefox/Oshkosh Public Library structure is not a significant issue for the local library. Several participants were not even aware of this as an issue until seeing emails about this issue. The perspective of many is that "a few larger libraries are driving that concern" and that it "got old." Some noted that they "don't have time for the political intrigue." "I was very surprised by the depth of it." "We need to have less squabbling." "Get on with it. They need to let it go." "We were amazed at the gripes about individuals and personalities." The system members on this side of the issue do not really see it as significant for their libraries. "If all the computers turn on in the morning, we are happy." "Day-to-day, life is business as usual." Some reported progress on this issue, concluding "it is better and calming down. It was a mess."

On the other side of the discussion is a strong desire to study and consider separating Winnefox Library System and Oshkosh Public Library. The question to be considered by these individuals is "should the system be split off from the resource library?" "This is still an unresolved issue." An example given about the dilemma of the dual directorship was the potential situation if Oshkosh Public Library did not meet the maintenance of effort rule. In this case, would the director of the system need to write a letter to himself as director of Oshkosh? The desire to split the system and resource library was expressed by a few library directors in two of the

counties. There is limited evidence that this is a primary concern system-wide, as this was not identified as a critical issue across all the focus groups. Only two Wisconsin systems have this structure currently, however, so in the future it may become more necessary to study alternative structures for Winnefox Library System.

The real concern around this issue centers on how time is allocated between Winnefox and Oshkosh Public Library with shared staff positions. Basically, it is less about the joint administration and more about the use of shared staff positions. Some noted that there has been progress in reducing the number of shared positions. "They have made an effort to separate positions and know who does what." The situation, however, still was described as "muddy." Staff have "conflicting responsibilities and different bosses." "How do they know who they work for?" "We need something written down as to the 20/80 percent split" for the director position. "Are we getting our money's worth?" "Are we getting the time that we should?" "We need a full return, and we're not getting it." While this view was not expressed by all participants, comments were made across all five counties, indicating that this is an issue that needs more attention.

For shared positions, participants expressed a desire for documentation of the time used for Winnefox and for Oshkosh. "They need to log their work." For some, their perception is that Oshkosh activities may take priority. "Is Oshkosh 90 percent and others at 10 percent?" For others, the desire to document the time is more just part of being accountable, rather than a feeling that member libraries are not receiving their fair share. A few noted that knowing how time is used could show that the system activities may account for more than the reimbursed time.

## CHANGES AT WINNEFOX

The participants definitely feel there are positive changes at the system. "The change is exciting and positive." The director "is responsive to your individual needs." He is "good at remembering names" and "does what I need him to do." "Tremendous progress has been made since the new director came." "Meetings have changed tremendously - more conversations." WALs user groups were mentioned as helpful, and "people started feeling that they are being heard." "The openness to talk, openness to listen is wonderfully

refreshing." "It is more relaxed and open." "Communication is better; more things are in the open." "The process is working to surface things." "There is a real commitment to advancing what the organization comes up with."

The regular email updates about system staff activities are helpful. At smaller libraries, some felt there was not always time to read this summary, but they appreciate the effort. It was suggested that this report move from just listing tasks to reporting results.

The administrative staff are "very conscientious about follow up." Specific examples were given of thorough and quick responses to queries. Winnefox helps keep track of legislation. Prompt response to emails is a characteristic of the administrative staff.

Responsiveness of a few staff continues to be a concern for some members, although there was evidence of some improvement. "People are answering the phone in a more friendly manner and tone." "Winnefox staff is more responsive. Now they don't make you feel like an idiot." "Staff are communicating better than before." Others noted that "evaluations need to be improved." Some librarians would like to provide feedback on staff who work with them. "We never have the chance to evaluate - we are the clients." "We have no clout; they do ignore us." "The staff treat each other badly. Reminders are needed to tell them they are part of a team." "The personalities are an issue. Administration needs to make sure it is taken care of."

People appreciated that the new director tried to visit all the libraries, although a few reported that they still had not been visited. "He promised, but didn't show up." Work needs to continue to make sure "we don't feel like second class citizens." "We expected to see him more; the connection did not last." He is very visible at system meetings and was complimented for "keeping us updated via email."

As one librarian observed, "we are not necessarily a nimble organization - not quick decision makers." Yet, being inclusive is part of the positive movement at Winnefox, and this may slow down the decision making process. A few expressed concern over the length of the long-range planning process.

The main message from the interviews is that the system has improved in the area of communication. Continued efforts to make the work of the system more transparent are desired by members. "What is happening is working now - not sure about the future." "We need to keep looking at things and keeping it fresh."

## OBSERVATIONS

Winnefox Library System is not unique in differences of opinion based on size of library. It is logical that some services - e.g., processing, technical assistance - would be a higher priority for libraries with limited staff. There also are some libraries who do not access all the services of the system, and this difference in response also is typical of regional systems. Ever since systems have been formed, there has been some tension between small and large libraries. Based on comments made during the interviews, Winnefox is no different in this regard. Small libraries did express concerns about having their concerns addressed and needs met. Movement toward a change in structure for WALIS is seen as a positive step.

Opportunities for more input is good, but especially for the smaller library staff time is the major barrier to attending more meetings or responding to requests for feedback (e.g., on new databases). While there is a need to consider the small library perspective, participation in that decision making may be limited for some libraries because of time and staff constraints. This may fall in the category of an environmental factor that realistically will not change. Some noted that minutes are not always provided from meetings. A quick summary of key points would be helpful when there is not time to read full system reports and minutes.

Those who offer professional services (e.g., lawyers, consultants) use time logs to allocate time for different clients. A similar model can work for Winnefox and would help the system continue its improvement to be more transparent for members. At a minimum, sample time periods could be used to measure time allocation on the shared positions.

Overall, the image that emerges from the interviews is satisfaction with Winnefox Library System. In each group, positive comments were made about being a member of Winnefox. "Thank god I'm in Winnefox," said one

person. Winnefox was described as "top shelf." Some mentioned how much better things seemed at Winnefox after talking to librarians from other systems. "The kinds of services we are getting from Winnefox are not the same as libraries in other systems" [better]. It is "one of the best systems in the state because of all the services it offers." "The system has hung together very well financially and politically." "We've always worked hard together and with individuals." The "degree to which we've been able to bring every one on board for the sharing" (via WALs) is a strength of the system. As illustrated by these comments, desired changes within Winnefox fit more in the category of "tweaking" and "improving" rather than a need to fundamentally rethink system services and structure.

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September 2007