

## **Mandated and Non-Mandated Services Provided by Winnefox Library System**

Section 43.24(2) of Wisconsin Statutes lists service programs that public library systems are required to address. How these services are to be provided and to what extent are left to the discretion of each system's staff, board, and member libraries. Systems are not limited to these listed services but may also provide other services "designed to meet the needs of participating public libraries and the residents of the system area".

### **Mandated Services**

1. Written agreements that provide that member libraries will provide services to all residents of the system area and to provide for the loan of materials between member libraries. As libraries join a system they must sign a membership agreement as stated above. Once done these are in effect until a library withdraws from system membership. This service takes minimal system resources to implement and maintain.
2. Backup reference, information and interlibrary loan services from the system resource library Winnefox annually enters into an agreement with the Oshkosh Public Library for this service which is usually approved at the September board meeting.
3. Referral or routing of reference and interlibrary loan requests from libraries within the system to libraries within and outside the system. Interlibrary Loan (ILL) requests between Winnefox libraries are handled by the shared Integrated Library System (ILS). ILL requests between Winnefox and non-Winnefox libraries are handled by Winnefox staff using the OCLC resource sharing system. When a library receives a request from a user it sends the information to Winnefox staff which searches for available copies and requests that the item be sent to the requesting library. In deciding which library to request the item from priority is given to libraries which do not charge to loan and which receive delivery from the Wisconsin delivery system or another state's delivery system that connects with Wisconsin's. When Winnefox receives requests from non-Winnefox libraries Winnefox staff receive these items from the owning library and send them to the requesting library. Winnefox pays any postage charges and staff follows up if the item is not returned, billing the borrowing library for the cost. Member libraries may choose to provide this service without using Winnefox staff but none have done so.
4. Continuing education for library staff and trustees. Winnefox provides between 12 and 14 workshops a year for library staff and trustees, paying mileage costs for library directors and trustees who attend. We also provide matching grants to directors to assist in paying for conferences and classes. The newsletter *Trustee Tale*, produced in cooperation with the Outagamie Waupaca Library System, also provides information to trustees.
5. Electronic delivery of information and physical delivery of library materials to participating libraries. Winnefox provides van delivery to all member libraries. As the vans return to the Oshkosh delivery hub staff sorts incoming material for delivery to the destination library. Five libraries (not counting Oshkosh) receive delivery 5 days per week, six receive delivery 4

days per week, 18 receive delivery 3 days per week, and one has chosen to receive delivery 2 days per week.

Electronic delivery is not defined in statute and different systems have interpreted this requirement in different ways. The Winnefox extranet serves as a central point for links to information and web resources useful for library directors and staff. The Winnefox web page is a portal to member libraries' web pages and advocacy information for the public.

Provision of these additional non-mandated services helps fulfill this requirement:

- Support for locally-produced databases
- Access to online resources
- Network support

6. Service agreements with all adjacent library systems. Winnefox has written agreements with the 5 adjoining library systems and 8 additional systems allowing Winnefox area residents to use and borrow materials from libraries in those systems and to allow their residents similar access to our libraries. In most cases these agreements also allow library staff to attend workshops and other programs sponsored by other systems. This service takes minimal system resources to implement and maintain.
7. Professional consultant services to member libraries. Winnefox staff provides substantial consulting to member libraries. While all staff are available for consultant services, this is a primary duty of the Assistant Director. He meets monthly with directors in four counties and quarterly with the directors of the fifth county to help facilitate group activity planning and answer questions. He frequently responds to questions from library directors and staff, trustees, and municipal officials and occasionally attends library board, municipal board, or other meetings.
8. Promotion and facilitation of library service to users with special needs. This has not been given a high priority by member libraries. Winnefox staff share information with library directors and staff. Generally at least one workshop a year is on a topic related to serving users with special needs.
9. Cooperation and planning with other types of libraries resulting in agreements for the appropriate sharing of library resources. Winnefox is an active member of the Fox Valley Library Council (FVLC) which consists of public, K-12 school, college and university, hospital, and corporate libraries in the area. Through this group, library users have access to the resources of many of these libraries. FVLC also holds several educational meetings a year that library staff can attend. In past years Winnefox staff have served as officers in this organization, although none do at this time.
10. 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. This is the final service area listed in statutes, which allows Winnefox to provide the non-mandated services requested by member libraries.

## **Non-Mandated Services**

1. **Integrated Library System (ILS)** This is the shared catalog/circulation system/database used by 29 of 30 Winnefox libraries to check items in and out, maintain borrowers' records, and list what the library owns. While the ILS assists libraries to share materials provision of an ILS is not itself a mandated service and there is no requirement that a library participate in a shared ILS. While materials sharing is one benefit of an ILS the initial purpose and still the chief benefit was to allow libraries to automate and save staff time spent on routine clerical tasks.

In addition to maintaining the ILS hardware and software Winnefox provides additional services associated with the ILS which not all library systems do. These services include database maintenance to provide an easier-to-use catalog, online fine payment collection, collection agency support, support for online lists of new items added to library collections, and centralized notice production. Notices are sent out via email, phone call, and printed and mailed.

2. **PC support** Winnefox provides PC support for member libraries. This consists of purchasing PCs and peripherals, installing software, maintenance of anti-virus protection, PC service and troubleshooting, and the public PC timing software used by 14 libraries.
3. **Support for locally-produced databases** Winnefox provides support for the creation of locally-produced genealogical and historical databases and digitization projects and maintains them and makes them available online on Winnefox servers. Six individual libraries and two groups of county libraries have taken advantage of this. Winnefox servers currently host 17 databases.
4. **Access to Overdrive** Like the other 16 public library systems in Wisconsin, Winnefox is a member of the Wisconsin Public Library Consortium, which contracts with Overdrive for ebook and digital audio services. Funding for WPLC comes from the Winnefox budget. Funding for the Overdrive collection is paid for by libraries.
5. **Support for blogs** Four libraries host blogs on their web sites. These were set up by Winnefox staff and staff provide ongoing support.
6. **Web site design, maintenance, and hosting** Winnefox hosts websites for 29 libraries on our servers. Most of the sites were designed wholly or in part by Winnefox staff, and staff updates most of the content for 20 of them. As part of this we also have registered separate domain names for each library.
7. **Network support** Winnefox maintains the wide area network that connects member libraries to each other and gives them high-speed access to the internet.
8. **Email support** Winnefox supports a Microsoft Exchange email server and provides email service and spam filtering for staff at member libraries.

9. Wireless support When libraries first expressed interest in providing wireless internet access Winnefox worked out the most effective and least expensive way for libraries to implement this. Winnefox staff installed the necessary hardware and software in each library and continue to maintain this for all libraries.
10. Online resources page and online resources use statistics Winnefox maintains online resource gateway pages for libraries and provides reports of web site and online resource use for all libraries.
11. Summer Library Program (SLP) support Summer programs are an important part of most libraries' services and Winnefox supports this in several ways. We also offer centralized booking of performers, both those paid for by Winnefox and those the libraries pay for themselves, which allows us to negotiate for discounts when several libraries book the same performer. As part of this service we file the required 1099 forms and issue checks in advance so libraries can pay the performer on the day of the performance. Winnefox coordinates group purchases of commercially-produced posters, bookmarks, and other items. We also print many SLP materials at no charge to the library.
12. Informational publications Winnefox staff edit and produces several publications:
  - *Ides* is a blog and monthly email focusing on tips to better use the Microsoft Office products and search online more effectively.
  - *Library Sparks* is a blog and monthly email on library programming, fundraising, and grants.
  - *Speak up for Libraries* is a library advocacy blog and monthly email directed to members of the public. It highlights library services and encourages people to publically support their library
  - *Trustee Tale* is a quarterly print educational newsletter for library trustees. It is produced in cooperation with the Outagamie Waupaca Library System (OWLS).
13. Printing and graphics Winnefox has a graphic artist on staff and provides graphic design and printing for libraries. Libraries are allotted a credit balance at the beginning of the year. Libraries that exceed this are charged for materials (paper and toner) costs. The graphic artist service is provided at no charge.
14. Group licensing and purchasing Winnefox has on occasion coordinated group licensing to allow libraries to receive preferred pricing for online resources or movie performance licenses. We also purchase office supplies, barcodes, receipt printer paper, and library cards in bulk and re-sell them to libraries for a lower cost than if purchased by individual libraries.
15. County planning This has long been a Winnefox priority. Winnefox staff meet regularly with library directors in each county to share information, answer questions, and coordinate county funding requests. All five Winnefox counties reimburse their libraries for the full cost of serving county residents, which is not the case in many other counties. Four Winnefox counties provide additional funding on an ongoing basis and all counties have

funded special projects from time to time. This takes a significant portion of the assistant director's time.

16. Winnefox Cooperative Technical Services (WCTS) This service is funded by Green Lake, Marquette, and Waushara counties for the benefit of libraries in those counties and administered by Winnefox. WCTS provides centralized purchasing and processing of books and other materials. Processing consists of barcoding and adding items to the shared catalog and adding plastic covers, spine labels, etc. Additional services are library workdays, administering rotating collections, and organizing some continuing education activities.

## Winnefox 2010 Combined Budget Summary

### Revenues

State system aids	953,879	
Member libraries WALs fees	665,445	
Member libraries rotating collection fees	14,450	
County revenue for WCTS	177,630	
Contractual revenue from OPL	107,675	<i>Primarily for personnel</i>
Interest revenue	42,300	
Redgranite correctional delivery	1,005	
Printing revenue	2,000	
Other revenues	1,250	
WALS passthrough revenue	4,336	<i>For supplies purchased for libraries</i>
LSTA grants	26,700.00	
<b>Revenues</b>	<b>1,996,670</b>	
Planned transfers from reserves		
Transfer from WALs reserves	100,000	<i>For capital expenditures</i>
Transfer from WCTS reserves	9,500	<i>Grants to libraries</i>
Transfer from Winnefox reserves	55,448	
<b>Total transfers</b>	<b>164,948</b>	
<b>Total Revenues</b>	<b>2,161,618</b>	

### Expenditures

#### **Services: WALs**

Personnel	302,894	<i>3.5 FTE</i>
Operations support	183,794	<i>Primarily OPL database management &amp; circ support</i>
Supplies	16,000	
Minor equipment	1,500	
Maintenance	101,965	<i>Hardware &amp; SirsiDynix software maintenance</i>
Contractual services	76,329	<i>OCLC, audit, etc.</i>
Telecommunications	60,200	
Travel/Training	12,000	
Miscellaneous	100	
Capital expenditures	100,000	
Capital reserve fund	20,000	
<b>Total WALs</b>	<b>874,782</b>	

**Services: Collections**

Professional collection	850	
Wisconsin Public Library Consortium membership	3,509	
Overdrive downloadable material	4,144	
Playaway circuit	7,000	<i>Taken from reserves</i>
<b>Total Collections</b>	<b>15,503</b>	

**Services: Delivery**

Personnel	62,182	<i>1.9 FTE</i>
Statewide delivery	18,187	
Van replacement	-	
Gas	18,000	
Other	6,000	<i>Vehicle insurance, maintenance, etc.</i>
<b>Total Delivery</b>	<b>104,369</b>	

**Services: Reference**

Small Engine Repair	8,625
Heritage Quest	21,486
OCLC WorldCat Firstsearch/Badgercat	9,598
AskAway Virtual Reference	1,500
Resource library reference improvement	11,000.00
<b>Total Reference</b>	<b>52,209</b>

**Services: Interlibrary Loan**

Personnel	83,632	<i>2.15 FTE</i>
Resource library ILL Net-Lender	10,000.00	
OCLC ILL	2,421.92	<i>OCLC-ILL cost of \$4,922 offset by ILL lender credits at WILS</i>
ILL Postage	7,000	
Other	1,250	
<b>Total Interlibrary Loan</b>	<b>104,304</b>	

**Services: Summer Library Program Support**

Performers	10,000	
SLP materials	1,200	<i>Does not include SLP materials printed in-house</i>
<b>Total Summer Library Program</b>	<b>11,200</b>	

<b>Services: Technology Support</b>		<i>Web site development &amp; support, local database support, PC support</i>
Personnel	254,826	3.4 FTE
Staff training & travel	1,500.00	
Supplies	500.00	
Winnefox Technology Executive Council travel	1,200.00	
Surveymonkey subscription	200.00	
<b>Total Technology Support</b>	<b>258,226</b>	

<b>Services: Printing &amp; Graphics</b>		
Personnel	74,787	1.575 FTE
Printing supplies	14,000.00	
Digital duplicator maintenance	18,000.00	
Staff travel	100.00	
<b>Total Printing &amp; Graphics</b>	<b>106,887</b>	

<b>Services: Workshops &amp; CE</b>		
Kay Swan grants	500.00	
Mileage reimbursement	2,000.00	
Workshop expenses	3,000.00	
<b>Total Workshops &amp; CE</b>	<b>5,500</b>	

<b>Services: WCTS</b>		
Personnel	141,612	2.675 FTE
Rent	8,000	
Office expenses	2,825	
Contractual payment to OPL--Director	3,283	
Audit	1,200	
Review periodicals	400	
Staff training, travel, dues	2,000	
Rotating collections	13,800	
Grants to member libraries	29,509	
Capital	0.00	
<b>Total WCTS</b>	<b>202,629</b>	



**Funds Allocated to Member Libraries**

Net-lender payments	10,000.00	<i>For libraries that loan more than they receive</i>
WALS fee-increase assistance	8,262.40	
Accessibility grant	8,700.00	<i>LSTA funds</i>
VISTA support	5,000	<i>FDL &amp; Marquette counties</i>

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**Total Funds Allocated to Member Libraries**

31,962

**Administration**

Personnel	285,149	<i>4 FTE</i>
Rent	37,873	
Contractual payment to OPL--Director	29,547	
Staff travel	3,700.00	
Office supplies	2,500.00	
Postage & postage equipment	3,700	
Telephone	1,800	
Audit	10,800	
Fox Valley Library Council dues	1,100.00	<i>\$35 per library</i>
Staff/Board training, travel, dues	5,575	
Workman's comp	5,000.00	
Other	7,303	
Equipment purchase reserve		

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**Total Administration**

394,047

**Total Expenditures****2,161,618**