

# Winnefox Cooperative Technical Services Workflow Study

by Jane Richard



**Wisconsin Library Services**

Under the auspices of the Winnefox Library System (WLS), the Winnefox Cooperative Technical Services (WCTS) provides cooperative materials purchasing and processing for nineteen libraries within Waushara, Green Lake, and Marquette counties. Specifically, WCTS provides these services:

- *Preparing order lists from review journals & other sources*
- *Ordering materials*
- *Adding item records to the shared SirsiDynix catalog and barcoding items*
- *Entering short records in the shared catalog*
- *Physical processing of materials (plastic covers, ownership stamps, spine labels, etc.)*
- *Workdays, where WCTS staff visit libraries to help with weeding or other projects*
- *Ordering supplies, furniture, and special items, including comparing prices and features*
- *CD & DVD refinishing*
- *Administer two rotating collections (audiobook & large print)*

WCTS does not handle any of the cataloging or ILS maintenance for the system. Automation services through WLS are a separate fee based on a formula (regular borrowers, items in collection, and circulation) from \$6800 to something less than \$100,000. The labor costs for processing are folded into the county payment to WLS; otherwise the libraries are charged for the cost of the materials: label, barcode and mylar for covers.

Processing statistics for the last few years suggest that usage of WCTS services is declining (see Appendix C of this document). At the invitation of Cindy Wallace and Mark Arend, I began a workflow study to explore the possible reasons for the decline, and generate ideas for new services. The proposal for conducting this study is at the end of this document.

Winnefox staff identified 3 critical factors to be included in the report:

- Efficiency What could be done to make this office more efficient?
- Effectiveness How effective is WCTS in serving its customers: the public libraries in these counties? How could it increase its effectiveness?
- Service plan Are there services currently offered by WCTS that are seen as unnecessary? Are there possible services that libraries would find desirable or useful?

I visited WCTS on February 6, 2012 to talk with Section manager Cindy, and the two materials processors; Mark Arend was there as well. The (unwritten) mission of the section is to make the librarians' lives easier by taking on routine tasks and helping with special projects. The WCTS processing staff is experienced and each has well-defined roles, and do not have procedures manuals.

**Recommendation:** write, promote, and develop services within the framework of a mission statement

The statistics don't show a clear overall downward trend, but WCTS services are underutilized.<sup>1</sup> Individual library statistics show some are clearly using WCTS less (e.g. Coloma, Endeavor). Informal conversations indicate these possible reasons:

- Walmart gets materials in the library faster and cheaper
- BISAC implementation is more internal than expected

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<sup>1</sup> overall percent of items through WCTS: 54% in 2008, 56% in 2009, 49% in 2010, 60% in 2011



- Libraries might expect a faster turnaround (which is now 1 week, but sometimes 2)

Hoping to get a better idea of how the WCTS fits into the local library workflow, Cindy and Mark arranged for a lunchtime meeting with the WCTS Executive Committee on March 20, 2012, at Ripon Public Library. I wanted to know what services provided were most beneficial and why, and I asked what services didn't fit in with their workflows. I also wanted to know what big projects were coming up (or just finishing) in their libraries.

At the meeting were:

- Diane Disterhaft from Berlin
- Andrea Klapper from Montello
- Lucy Hazlewood from Markesan
- Linda Helmrick from Plainfield
- Nichole Overbeck from Wautoma
- Jane Richard from WILS,
- Mark Arend from Winnefox Library System
- Cindy Wallace from Winnefox Cooperative Technical Services

Although Cindy didn't learn anything new in this short meeting, it was useful for me to understand the perspective of the member librarians. I also used their comments to develop a survey tool that to test my impressions and to encourage brainstorming new services. The notes from that meeting are in Appendix A of this report. The survey questions and results are in Appendix B.

Prior to developing the survey, I met with Cindy at the Wisconsin Association of Public Libraries (WAPL) conference on May 10 in Stevens Point, and we discussed the director meeting and agreed on a survey as the next step. With Cindy and Mark's approval, I sent it to the 20 WCTS library directors on June 4, 2012, and a reminder was sent June 7, 2012. There were 17 responses when the survey was closed on June 12, 2012, and about 10 of them completed the entire survey (including the more open-ended questions).

In reviewing the qualitative questions of the survey, all 9 services are used to some extent by the libraries, mainly because the service saves time. Saving money was more appreciated for the CD/DVD refinishing, and for the rotating collections. Convenience ranked highly in all, but not a winner for any service. The benefits of "saving space" and flexibility were given very little weight in all services.

Reasons for not using a service was almost always given as being faster or more flexible to do in house. Only 3 or 4 librarians responded to this section, presumably because they all do use the services to some degree. The order lists had the most consensus-- perhaps it should be the first process to examine in depth.

As expected, the free text responses were the most interesting. The librarians gave high praise to WCTS. There are a few comments contrary to the in-person meeting. The very general sense I got from their answers is that they would like assistance with management skills, as well as with tasks, such as being efficient with email and paperwork in order to devote more time and energy towards programming, their top priority. The comments might be an excellent jumping off point for defining new services and further evaluating existing ones. For instance:

- Re-think the content (and format?) of rotating collections
- Create an interactive order list, perhaps on Google docs; send orders more frequently. Test with books in regular series.
- Tips on programming; nuts and bolts checklists or "toolkits" of how to accomplish: names, phone numbers, gear needed, handouts or goodies
- Develop process for libraries to order their own supplies and equipment, but with the cooperative purchasing discount.
- Strive to improve turnaround time, which may be achieved by eliminating something-- even some small step-- or negotiating a compromise on how much customization can be done at WCTS.



- Explore having books sent directly to the library with some level of shelf-readiness. Everyone relies on the holdings records being added by WCTS-- can shipping lists be sent to both library (to unpack) and to WCTS (to add holdings)? The book can get more detailed cataloging and processing after the first checkout or two.

One of the great benefits of opening up and looking at internal processes is the outpouring of ideas and new paths to follow. The creative brainstorming is refreshing and fun, but where does all this information lead us to? What's the next step?

It may be helpful to pick out easy changes to make quickly (for instance, Cindy bought new stamps after my visit because the tour caused her to notice that the old ones were getting ragged). The more complex issues, like improving turnaround time, will involve more factors, thus necessarily will take longer to plan and implement. Focusing on 2 or 3 for the mid-term will keep it manageable.

**Recommendation:** In light of what has been learned in the study so far, go back to inventory the exact tasks performed in WCTS, particularly focusing on those that triggered a neutral or negative comment in the discussions or survey.

Going back to the original parameters of this study, the following graph is one suggestion for evaluating what has been learned so far. Fill in what you can and find the biggest questions to address next.

	<b>Efficiency</b>	<b>Effectiveness</b>	<b>Service plan</b>
<b>Order lists</b>	Good choices, appreciate the choices and effort	Too infrequent	Prepare more often; make more interactive or have more local input
<b>Order materials</b>	Easier to do in-house than relay information	Appreciate timesaving	Explore approval plans Explore getting materials delivered with barcode and label
<b>Physical processing</b>	Accurate, but slow turnaround	Some appreciate customization	Aim for general standard of 24-48 hour turnaround
<b>Workdays</b>	If day is well-defined, the tasks are done quickly	Hard to fit in to workflow; sense that it's hard to articulate appropriate projects	Provide detailed examples (with who-what-when-why guidelines) to help identify projects
<b>Order supplies, etc.</b>		Discounts appreciated	
<b>CD/DVD refinishing</b>	New machine is good, though it still takes up a lot of personnel hours	Appreciated by libs without a machine of their own	
<b>Rotating collections</b>	Some duplication in libs	Slight dissention about usefulness. Area for further questions	New formats? Floating collections?

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It was my pleasure to work on this project. Please let me know how I, or WILS, might assist in the next phase. I will continue to be interested in how you implement ideas from the survey, or any part of this process.

-Jane



## Appendix A

The following is a synopsis of the director discussion March 20, 2012, at Ripon Public Library:

Librarians like the pre-order services:

- The review list
- Rely on Cindy to field inquiries from vendors (e.g. preview pages)

and the processing services save much time & space

- Would have to hire someone to do it
- Saves space, and effort to set up (libraries are quite small)
- WCTS does the “hard stuff”

Rotating collections are popular

- Saves space
- Keeps the collection fresh
- Don’t have to take on the weeding

Librarians tend to NOT use WCTS for:

- Gifts
- "Easy stuff" (not well-defined)
- Complicated, but inherited, sticker systems for A-V “You don’t wanna do” at Wautoma (other librarians had suggestions for better cabinets; Mark and Cindy suggested re-classing with WCTS help)

Upcoming projects and preoccupations

- Programming: always a concern
- Lego club at Wautoma
- Fund-raisers to pay for 2009 re-model at Wautoma
- Keeping troublesome staff busy, not talking (a lot of ideas shared: shelf-reading, cleaning, displays, website content, find niche: writing? Computer tutor? Organizing? Adult craft workshops)
- Big roll-out for National Library Week
- 15th anniversary of library
- volunteer appreciation (re-schedule to overlap with summer population)
- restore murals (suggestion to use art dept at UW-O, UW-SP; JR suggested Kohler museum)
- Taste of Wautoma fundraiser
- Booksale: Cindy and Andrea talked about organizing books ahead of time; Andrea is using more volunteers to do this
- Training staff
- Happy to get time-saving tools, like internet check-in and timer, receipt printer instead of stamping
- Best practices DVDs and CDs storage



Appendix B. Winnefox Centralized Technical Services survey to the 20 WCTS library directors. Sent June 4, 2012 and a reminder June 7, 2012. There were 17 responses when the survey was closed on June 12, 2012.

1. I use these services because: <span style="float: right;"><a href="#">Create Chart</a> <a href="#">Download</a></span>						
	Convenient, fits my workflow	Saves time	Saves money	Saves space	Flexible to meet local needs	Response Count
Preparing order lists from review journals & other sources	66.7% (8)	<b>91.7% (11)</b>	41.7% (5)	8.3% (1)	8.3% (1)	12
Ordering materials	71.4% (10)	<b>78.6% (11)</b>	71.4% (10)	7.1% (1)	14.3% (2)	14
Adding item records to the shared SirsiDynix catalog and barcoding items	56.3% (9)	<b>100.0% (16)</b>	50.0% (8)	6.3% (1)	12.5% (2)	16
Entering short records in the shared catalog	64.7% (11)	<b>82.4% (14)</b>	23.5% (4)	5.9% (1)	11.8% (2)	17
Physical processing of materials (plastic covers, ownership stamps, spine labels, etc.)	50.0% (8)	<b>100.0% (16)</b>	56.3% (9)	31.3% (5)	12.5% (2)	16
Workdays, where WCTS staff visit libraries to help with weeding or other projects	50.0% (8)	<b>56.3% (9)</b>	50.0% (8)	18.8% (3)	43.8% (7)	16
Ordering supplies, furniture, and special items, including comparing prices and features	40.0% (6)	<b>86.7% (13)</b>	<b>86.7% (13)</b>	6.7% (1)	20.0% (3)	15
CD & DVD refinishing	53.8% (7)	76.9% (10)	<b>92.3% (12)</b>	23.1% (3)	15.4% (2)	13
Administer two rotating collections (audiobook & large print)	38.5% (5)	46.2% (6)	<b>92.3% (12)</b>	61.5% (8)	46.2% (6)	13
None of the reasons above (please explain if possible) <a href="#">Hide Responses</a>						2
<p>duplication of titles. We own most of the titles in the rotations. 6/5/2012 9:28 AM <a href="#">View Responses</a></p> <p>There are times when I will order materials or supplies or furniture because I know the particulars of what I need best or I can get items a bit cheaper and faster (dvds, especially). This is not to take away from the great deal of work and good that WCTS provides. It is more about being realistic about what WCTS can accomplish when serving so many libraries and more about using my own ordering to compliment the ordering I do through WCTS. 6/5/2012 7:59 AM <a href="#">View Responses</a></p> <p>I do a lot of prepping for booktalks, storytime etc. and actually doing my own reviewing is productive to tasks other than ordering. That is why I continue to do it. We have our own refinisher and have had for some time. 6/4/2012 2:43 PM <a href="#">View Responses</a></p> <p>Convenience for many of these items. Processing done correctly. 6/7/2012 12:53 AM <a href="#">View Responses</a></p> <p>I think the rotating collections for the most part have maxed out their usefulness. Where the collection development at WCTS would be the most help is having things that can be reserved by the WCTS libraries that are in series form. It is often difficult to buy "all" of the books/autos/dvd's that are in series. 6/4/2012 2:43 PM <a href="#">View Responses</a></p>						

  

2. I don't use these services because <span style="float: right;"><a href="#">Create Chart</a> <a href="#">Download</a></span>						
	I didn't know about it	Inconvenient/hard to work into regular workflow	Faster in house	Cheaper in house	More flexible in house	Response Count
Preparing order lists from review journals & other sources	0.0% (0)	25.0% (1)	0.0% (0)	0.0% (0)	<b>100.0% (4)</b>	4
Ordering materials	0.0% (0)	0.0% (0)	50.0% (2)	25.0% (1)	<b>75.0% (3)</b>	4
Adding item records to the shared SirsiDynix catalog and barcoding items	0.0% (0)	0.0% (0)	<b>100.0% (1)</b>	0.0% (0)	0.0% (0)	1
Entering short records in the shared catalog	0.0% (0)	0.0% (0)	<b>100.0% (2)</b>	0.0% (0)	0.0% (0)	2
Physical processing of materials (plastic covers, ownership stamps, spine labels, etc.)	0.0% (0)	0.0% (0)	<b>100.0% (2)</b>	0.0% (0)	0.0% (0)	2
Workdays, where WCTS staff visit libraries to help with weeding or other projects	0.0% (0)	<b>100.0% (1)</b>	0.0% (0)	0.0% (0)	0.0% (0)	1
Ordering supplies, furniture, and special items, including comparing prices and features	<b>50.0% (1)</b>	0.0% (0)	<b>50.0% (1)</b>	0.0% (0)	<b>50.0% (1)</b>	2
CD & DVD refinishing	0.0% (0)	0.0% (0)	<b>66.7% (2)</b>	0.0% (0)	33.3% (1)	3
Administer two rotating collections (audiobook & large print)	0.0% (0)	0.0% (0)	0.0% (0)	0.0% (0)	0.0% (0)	0
None of the reasons above (please explain if possible) <a href="#">Hide Responses</a>						3

### 3. How could any of the services be improved?

I'd like quicker turnaround time, but wouldn't everyone?

6/7/2012 12:53 AM [View Responses](#)

quicker turn around on DVD's

6/6/2012 1:41 PM [View Responses](#)

Just have the order lists on line to save time and money.

6/5/2012 9:28 AM [View Responses](#)

Perhaps check the extranet and see if all the 'how-tos' are up to date. I use it alot. Send your bills(invoices) on colored paper or with a different border or something. All the paper on my desk looks the same. I have ADHD with dyslexia and need all the help I can get, not that it's anyone else's responsibility for my success...Generally, what helps me helps the whole population, however.

6/4/2012 6:32 PM [View Responses](#)

I'm so impressed with the services:)

6/4/2012 4:20 PM [View Responses](#)

I'm so impressed with the services:)

6/4/2012 4:20 PM [View Responses](#)

It would be nice to have order lists every month, which would make the list shorter and more up to date. And new books would be coming into the library more regularly.

6/4/2012 3:21 PM [View Responses](#)

I think WCTS does a great job for us and I find Cindy very open to suggestions and to the resolution of problems.

6/4/2012 2:43 PM [View Responses](#)

### 4. If there were no limitations, what projects or daily tasks could WTS do to help you?

Magazine Subscription tracking and single source ordering.

6/11/2012 5:47 PM [View Responses](#)

Line up ideas for adult programs.

6/5/2012 9:28 AM [View Responses](#)

It is time consuming to add an item to the selection list that isn't on the selection list. If there were no limitations, simply sending the titles and authors would be easier than coping the barcode, title, author, price, etc. And the add on items tend to get ordered last, so there is more of a wait involved. But again, I think if speed is a priority here, simply ordering ones self takes care of the problem.

6/5/2012 7:59 AM [View Responses](#)

I'd love to see how others organize their computer files and make it through all the emails everyday. Perhaps a half day shadowing a successful librarian nearby???

6/4/2012 6:32 PM [View Responses](#)

I think they do wonderfully well, just the way they are.

6/4/2012 3:21 PM [View Responses](#)

Offer some very short write-ups or "shelf-talkers" for popular authors. Create series or genre bookmarks for popular authors or genres to place on front desk.

6/4/2012 3:01 PM [View Responses](#)

Is there ever enough time to read shelves??

6/4/2012 2:43 PM [View Responses](#)

### Question 5, continued:

Doing some of the regular maintenance in the database like checking townships on patron records tends to get pushed off and then I have to do catch-up. It is probably what I'll have Cindy help me with on a workday. One skill I need to get better at is learning how to delegate and manage my staff better, so any workshops on that subject would be welcome.

6/5/2012 7:59 AM [View Responses](#)

I'm not doing the adult book club thing...maybe I'll have time this fall. I have to do my book orders from home...no time or privacy. All my new learning has to be done at home as well. I am still having trouble figuring out my budget here. I have one, the clerk has one, the library board treasurer has one. None of them gibe. Will address this next Tuesday, however, my first year was really hard because of that. I'm just now getting into a 'flow' that sort of makes sense. Wish I had a mentor that first year. Some things I was too green to even know to ask.

6/4/2012 6:32 PM [View Responses](#)

As a part-time director, (24 hours per week), I find my time is really stretched. I have been devoting a lot of time to programming, but would like to offer more.

6/4/2012 4:20 PM [View Responses](#)

Electronic books is a subject that could be improved upon in our library, especially with all the new gadgets.

6/4/2012 3:21 PM [View Responses](#)

Enhancing Public sapce: How do I negotiate for a preliminary space study or remodel design that we can afford? Learning a Skill: I would like someone to sit down with me and set up accounts on our new Nooks & Kindles. I need to get them circulating.

6/4/2012 3:01 PM [View Responses](#)

Senior programming

6/4/2012 2:45 PM [View Responses](#)

I am not sure about this one.

6/4/2012 2:43 PM [View Responses](#)

5. What is not getting done in your library because you don't have the time, expertise, space. Please expand if possible:

[Create Chart](#) [Download](#)

	Response Percent	Response Count
Specific projects	42.9%	6
Programming for some part of the population	78.6%	11
Weeding	14.3%	2
Enhancing public or staff space	50.0%	7
Learning a skill	42.9%	6
Other, or more:		7

[Show Responses](#)





Appendix C. WCTS processing statistics

Library	2011				2010			
	Items added 2011	WCTS ordered/ processed 2011	Percent of items through WCTS	Collection Exp.	Items added 2010	WCTS ordered/ processed 2010	Percent of items through WCTS	Collection Exp.
Berlin	3,801	3,212	84.50%		3,921	3,404	86.81%	\$45,702
Coloma	1,732	495	28.58%		1,539	653	42.43%	\$10,965
Endeavor	417	79	18.94%	\$2,613	560	254	45.36%	\$2,569
Green Lake	3,505	1,303	37.18%	\$56,100	4,851	1,433	29.54%	\$49,662
Hancock	639	385	60.25%		3,004	350	11.65%	\$8,059
Kingston	822	582	70.80%		1,049	626	59.68%	\$12,566
Markesan	1,062	813	76.55%		1,249	1,032	82.63%	\$17,354
Montello	1,072	595	55.50%		1,479	742	50.17%	\$8,101
Neshkoro	223	194	87.00%		139	103	74.10%	\$4,196
Oxford	1,500	1,440	96.00%		231	207	89.61%	\$3,891
Packwaukee	903	422	46.73%		707	329	46.53%	\$5,198
Pine River	1,186	423	35.67%		1,678	429	25.57%	\$9,931
Plainfield	1,199	1,010	84.24%		1,525	862	56.52%	\$9,723
Poy Sippi	264	275	104.17%	\$4,116	579	436	75.30%	\$5,100
Princeton	1,989	1,164	58.52%		2,258	1,111	49.20%	\$28,875
Redgranite	860	157	18.26%		784	199	25.38%	\$3,995
Wautoma	1,943	1,268	65.26%		2,418	1,196	49.46%	\$15,683
Westfield	1,656	1,181	71.32%		1,535	990	64.50%	\$11,458
Wild Rose	964	392	40.66%		1,101	530	48.14%	\$14,549
<b>Total/Average</b>	<b>25,737</b>	<b>15,390</b>	<b>59.80%</b>	<b>\$62,829</b>	<b>30,607</b>	<b>14,886</b>	<b>48.64%</b>	<b>\$267,577</b>

Library	2009				2008				4-Year average
	Items added 2009	WCTS ordered/ processed 2009	Percent of items through WCTS	Collection Exp.	Items added 2008	WCTS ordered/ processed 2008	Percent of items through WCTS	Collection Exp.	
Berlin	4,896	3,334	68.10%	\$42,340	4,540	2,920	64.32%	\$38,390	75.01%
Coloma	2,280	1,323	58.03%	\$10,413	1,900	1,486	78.21%	\$8,054	53.11%
Endeavor	515	447	86.80%	\$2,499	303	323	106.60%	\$3,141	61.45%
Green Lake	5,077	1,789	35.24%	\$53,927	4,500	1,530	34.00%	\$41,484	33.76%
Hancock	549	270	49.18%	\$7,550	414	331	79.95%	\$7,500	29.01%
Kingston	826	612	74.09%	\$12,055	932	508	54.51%	\$12,079	64.15%
Markesan	1,653	1,041	62.98%	\$19,514	1,558	1,008	64.70%	\$17,504	70.52%
Montello	893	473	52.97%	\$9,856	1,269	605	47.68%	\$11,629	51.24%
Neshkoro	297	109	36.70%	\$3,067	579	102	17.62%	\$2,550	41.03%
Oxford	245	250	102.04%	\$3,398	208	146	70.19%	\$3,150	93.54%
Packwaukee	694	420	60.52%	\$4,810	644	339	52.64%	\$5,311	51.22%
Pine River	1,521	370	24.33%	\$8,932	1,869	317	16.96%	\$7,884	24.61%
Plainfield	1,340	800	59.70%	\$11,557	1,631	888	54.45%	\$8,426	62.51%
Poy Sippi	772	420	54.40%	\$6,123	784	449	57.27%	\$7,069	65.86%
Princeton	2,112	1,031	48.82%	\$25,147	2,073	1,151	55.52%	\$20,344	52.86%
Redgranite	1,083	268	24.75%	\$4,390	1,074	246	22.91%	\$5,059	22.89%
Wautoma	2,003	1,962	97.95%	\$22,118	2,465	2,300	93.31%	\$26,501	76.18%
Westfield	1,455	1,061	72.92%	\$11,290	1,521	807	53.06%	\$10,421	65.49%
Wild Rose	1,158	483	41.71%	\$11,048	1,222	448	36.66%	\$9,484	41.69%
<b>Total/Average</b>	<b>29,369</b>	<b>16,463</b>	<b>56.06%</b>	<b>\$270,034</b>	<b>29,486</b>	<b>15,904</b>	<b>53.94%</b>	<b>\$245,980</b>	<b>54.38%</b>

"Items added" is total of books and serials, audio, and video as reported on library annual reports.

## Winnefox Cooperative Technical Services (WCTS)

Workflow Analysis report by WiLS staff

Study PROPOSAL

December 12, 2011

Winnefox staff identified 3 critical factors to be included in the report:

- Efficiency What could be done to make this office more efficient?
- Effectiveness How effective is WCTS in serving its customers: the public libraries in these counties? How could it increase its effectiveness?
- Service plan Are there services currently offered by WCTS that are seen as unnecessary? Are there possible services that libraries would find desirable or useful?

WiLS suggests taking on the following process:

### 1. DOCUMENT current services

Through written documentation and telephone follow-up, WLS will provide details on how the WCTS services are accomplished. These services include:

- *Preparing order lists from review journals & other sources*
- *Ordering materials*
- *Adding item records to the shared SirsiDynix catalog and barcoding items*
- *Entering short records in the shared catalog*
- *Physical processing of materials (plastic covers, ownership stamps, spine labels, etc.)*
- *Workdays, where WCTS staff visit libraries to help with weeding or other projects*
- *Ordering supplies, furniture, and special items, including comparing prices and features*
- *CD & DVD refinishing*
- *Administer two rotating collections (audiobook & large print)*

Striving to address as many as possible, providing similar information for each, such as:

- *Who* does the work at system and for whom at the library
- *What* are the steps from beginning to end
- *When* are there cycles of this work, or is it continuous
- *Where* is the work done
- *Why* or how did this service start
- *How much* does it cost the system and/or the library
- *What* is the ideal for the service

A site visit will be conducted to see the services in action once the documentation has been reviewed and early questions have been answered.

### 2. DOCUMENT processes at libraries

As libraries are purchasing and processing many items independently, two system libraries will be chosen as case studies to determine what the libraries are doing in place of services offered by the WCTS. The information gathered will inform questions to ask all libraries and also possible service directions. WiLS staff will gather this information in site visits to the libraries.

### 3. SURVEY perception and needs

WiLS staff will analyze responses from steps 1-2 to create a survey to gather information about the effectiveness of current services and potential new or different services. WLS will help with development of the survey and with internal promotion (why the survey is being done, assurance of anonymity, etc.).

### 3. RESEARCH future directions





WILS staff will research other centralized technical services operations to identify potential directions for service for WCTS.

#### **4. SUBMIT written report**

WILS will write and submit a report for WLS staff, and allow time for internal evaluation and a method for feedback and revision.

#### **5. DISCUSS future directions**

WILS can lead an all-staff discussion of future directions based on findings and suggestions in the report.

The original request from Winnefox staff is below:

*Winnefox Cooperative Technical Services (WCTS) is a service program of the Winnefox Library System. It is funded by Green Lake, Marquette, & Waushara counties and primarily serves the 19 public libraries in those counties. The WCTS office is located in the Berlin Public Library.*

*WCTS services include:*

- *Preparing order lists from review journals & other sources*
- *Ordering materials*
- *Adding item records to the shared SirsiDynix catalog and barcoding items*
- *Entering short records in the shared catalog*
- *Physical processing of materials (plastic covers, ownership stamps, spine labels, etc.)*
- *Workdays, where WCTS staff visit libraries to help with weeding or other projects*
- *Ordering supplies, furniture, and special items, including comparing prices and features*
- *CD & DVD refinishing*
- *Administer two rotating collections (audiobook & large print)*

*We are requesting a workflow and service analysis by WILS staff. These factors will be included in this analysis:*

- *Efficiency What could be done to make this office more efficient?*
- *Effectiveness How effective is WCTS in serving its customers: the public libraries in these counties? How could it increase its effectiveness?*
- *Service plan Are there services currently offered by WCTS that are seen as unnecessary? Are there possible services that libraries would find desirable or useful?*

*There are two factors prompting this review. First, WCTS is dependent on county funding, which is in turn dependent on the support of member libraries. Second, libraries are purchasing and processing many items independently of WCTS; in 2010 libraries in these counties ordered and processed only 49% of items added through WCTS.*

