

What is DPI's role when it comes to library systems?

While this list is not exhaustive, some general statutory responsibilities DPI holds pertaining to library systems include:

- Assisting with the development of local library and library system services to serve the needs of all residents in the state;
- Promoting cooperation and resource sharing;
- Coordinating and conducting continuing education programs for library workers;
- Providing consulting services to library systems and their governing bodies;
- Establishing standards for public library systems;
- Authorizing the establishment of public library systems;
- Authorizing any alterations of system territories;
- Administering federal and state aids to public library systems;
- Collecting and maintaining data, such as the annual report;
- Receiving and reviewing county plans for library service;
- Offering assistance when systems and resource libraries are unable to negotiate an agreement;
- Monitoring the system effectiveness statement, as required by local library boards as part of the annual reporting process.
- Approving the expulsion or reduction of services to a municipality or county that fails to meet system membership requirements;
- Reviewing reports and proposed service plans for compliance with Chapter 43.

What is the role of a library system?

To receive state aid under 43.24, systems must:

- Have written agreements with all member libraries that comply with s. 43.15;
- Have a written agreement with a system resource library, which includes the provision of back-up reference, interlibrary loan services, and specialized collections;
- Provide the referral of reference and interlibrary loan requests from libraries within the system to libraries within and outside the system;
- Offer professional development opportunities for participating library personnel and trustees;
- Provide electronic and physical delivery library materials;
- Have service agreements with all adjacent library systems;
- Provide consulting services to participating libraries;
- Facilitate library service to users with special needs;
- Develop library technology and resource sharing plans;
- And offer any other service programs designed to meet the needs of member libraries and the residents of the system area, as determined by the system board after consultation with member libraries.

Do all library systems operate the same?

All systems must meet the same state statutory requirements for systems under Chapter 43, as previously outlined.

Each system's specific operational details vary due to several factors, some of which include the number of member libraries, population density, financial support, staff size, and geography. Systems provide services based on member needs, which can vary around the state, and may operate under different models, based on available resources and other unique factors. Take delivery of materials for example. One system may elect to share in the funding of delivery service, while another may not charge its members-- even at 5 days per week. Due to these differences, the equity between systems can vary greatly, and the services that systems offer can also vary greatly. In other words, the baseline of what must be provided is outlined in Chapter 43, but the extent to which a system provides those services is up to the system and its member libraries, and is dependent on a number of regional factors. This makes statewide equity a challenge, and the library community has worked hard to level that playing field through PLSR.

What is the role of a resource library?

In 1971, when Wisconsin Act 152 introduced the formation of public library systems, it stipulated that a public library system must contain at least one public library in a city with a population of more than 30,000, to guarantee at least one population concentration of sufficient size to encourage and justify the development of diversified collections and services. Legislators also believed that a city of this size would provide public library strength upon which a system could build, as it would otherwise be prohibitively expensive. At that time, a system territory population minimum was included to further ensure that each system would have a large enough total population to support and utilize comprehensive library services. The headquarters library referred to in this early legislation would later be formalized as a resource library.

Today, a resource library must have a collection size of at least 100,000 volumes, be open to the public at least 50 hours each week, and it must employ at least one full-time, permanent reference librarian with an MLS. A system resource library must provide backup reference, interlibrary loan services, and specialized collections to the other member libraries. While some resource libraries provide additional services to their systems (such as cataloging services), the written agreement between the resource library and the system must provide these statutory requirements for a system to receive state aid, per Wis. Stat. sec. 43.24(2)(b). Resource libraries are paid for these services.

Can a library be a resource library to a system it is not affiliated with?

Yes, but only in specific circumstances. First, there may be no qualifying library in the system or academic library in the system area (collection size greater than 100,000, open at least 50 hours per week, and full-time MLS prepared reference librarian on staff). If no there is no such library, the system must have a supplementary contract with a system resource library from an adjacent system. MCPL could not become a system resource library for WVLS if it joins SCLS, because WVLS would be required to contract with a system resource library from an adjacent system.

What happens to all the libraries in Northeast Wisconsin that MCPL is currently serving as a resource library if we change system membership, and what is their step by step process to find a new resource library and how much inconvenience would that create for them, or not?

WVLS is required to have at least one resource library, and if MCPL changes systems, then WVLS would be required to contract with a new one that meets the statutory requirements mentioned earlier. If no member library meets all three of those requirements, then WVLS must negotiate a supplementary contract with either the academic library with the largest operating budget in the system area who meets the three requirements, or with the resource library in an adjacent system.

Since no libraries in the system area would meet all of the qualifications, WVLS would have to contract with one of the resource libraries in an adjacent system. Their options are limited to the libraries in Appleton, Green Bay, Eau Claire, La Crosse, Madison, or Superior. They would conduct this negotiation in the same way as they have every year with MCPL. The division would only become involved if WVLS had difficulty reaching an agreement with a resource library, which seems highly unlikely. WVLS would then have the opportunity to contract with a member library to serve as a regional resource library, if they wish. South West Library System faces the same challenge and contracts with Madison, while Platteville serves as its regional resource library.

The Resource Library aspect of an MCPL departure is not as impactful on WVLS as other factors, such as the reduction of collections, the loss of its headquarters, the loss of funding, and the loss of the centralized population that systems were to be built upon. WVLS is accustomed to negotiating such contracts, and is not short of leadership among its member libraries.

WVLS and its proxies have been telling the public that our leaving for the SCLS would damage or harm the other WVLS member libraries. Is that true? Please elaborate.

Yes, it will undoubtedly create hardship for the remaining WVLS libraries, and the extent to which WVLS is able to recover is unknown. WVLS will lose the MCPL membership fee of roughly \$80,000, and the roughly \$375,000 in state aid that it receives for service to Marathon County. This is just under 20% of the system's budget, and WVLS will need to make difficult decisions on how to recoup from that loss of revenue. How they do that is up to them, but potential areas of concern are system staffing, membership fees, and service offerings. Any of these options could have significant effects on member library services at the local level. Impacts will vary from location to location. But WVLS may also see a reduction in expenses because they will no longer have to serve Marathon County. DPI is not in the position to predict the extent of any of these effects.

The most tangible effect on member libraries will be the loss of MCPL's collections that are currently available to all library users in the system. Perhaps the biggest drawback to contracting with a resource library outside the system is that the collections of that new resource library will not be part of the WVLS shared catalog. While member libraries still have access to materials through statewide resource sharing, it involves additional time and effort on the part of staff and library users. An MCPL departure will result in the overnight disappearance of nearly half of the system's materials, and this will have a significant impact on the remaining libraries.

During the past 30 years, have any other libraries changed systems, and did the remaining libraries survive? Which systems and libraries can you identify that have done so?

Aside from the gradual addition of member libraries as counties joined system territories after their inception in 1971, the following changes in system affiliation have occurred:

The first action to change systems occurred in 1995, when Wood and Portage counties began proceedings to withdraw from Wisconsin Valley and join South Central. Because at that time system territories were required to be contiguous, Adams County joined in the change, in part because the Adams County Library Board determined that Adams County should belong to the same library system as Wood, due to use of both libraries by out-of-county residents.

The second action occurred in 2000, when Fond du Lac County withdrew from the Mid-Wisconsin Federated Library System to join Winnefox. At the time, Mid-Wisconsin did not have a shared catalog, so all member libraries were standalone libraries, with only their own collections and library cards to offer their users. Winnefox offered a robust shared catalog, staff support, and networking opportunities. The Fond du Lac Public Library was the system resource library and the location of the system headquarters, so when they withdrew from the system, Mid-Wisconsin

contracted with Horicon to be its resource library and moved its headquarters there. It would have also had a supplementary contract with either an academic library or an adjacent system's resource library, as none of the remaining libraries would have met the requirements.

In 2007, Mid-Wisconsin teamed with Lakeshores Library System to form a shared catalog. A merger between those two systems was considered; however, relationships struggled and in 2014 Mid-Wisconsin withdrew all of its libraries and their materials from the shared catalog and formed its own. When that happened, the Beaver Dam library board voted not to include its materials in Mid-Wisconsin's new shared catalog. Both of these events greatly reduced the materials available to its member libraries, which led libraries to pursue other system membership options.

The ability for an individual library to change systems is rare, because only a library whose municipality lies in at least two counties of different systems can do so. Hutchinson Memorial Library in Randolph is, to my knowledge, the only individual library to ever change system membership. The village of Randolph lies in both Dodge and Columbia counties. It had previously designated Dodge County as its home county, which was part of the Mid-Wisconsin Federated Library System. In 2015, when Mid-Wisconsin was exploring merger options with other systems, Randolph changed its home county designation to Columbia County, which allowed for membership in the South Central Library System at the beginning of 2016.

At the same time that Randolph pursued its departure, Jefferson County also began withdrawal from Mid-Wisconsin. In an effort to provide the citizens of Jefferson County with the best available library resources, the Jefferson County Library System Review Committee conducted a review of its current library system and examined what services and resources other library systems could provide. The Review Committee held Q&A sessions with four adjacent library systems (South Central, Arrowhead, Lakeshores, and Waukesha County Federated), and concluded that the Waukesha County Federated Library System would be the best option for their county. Waukesha County Federated dissolved its one-county system and worked with Jefferson County to establish the Bridges Library System, effective at the beginning of 2016.

Then, left with a reduced system territory of 2 counties, a greatly reduced number of materials in its shared catalog, and a retiring system director, Mid-Wisconsin pursued merger in earnest, as operating became unsustainable. They found that a merger with the Eastern Shores Library System would be the best option, and together they formed the Monarch Library System, effective at the beginning of 2017.

What structural mechanisms are in place to regulate the actions of state agency library systems when a member library chooses to explore its options for system membership? Are there any policies, procedures, or guidelines to inform or regulate the actions of that system, its board members, or proxies in that community? How would an ethics complaint be pursued against a library system for their actions if it were warranted?

Public library systems are not state agencies, they are regional entities operating under their own boards and bylaws, as provided for under Chapter 43. Their operations most closely resemble local public libraries. Our state structure for public library service was designed with the intent that all public libraries would belong to regional library systems, and that those systems would receive aid from the state to provide regionally appropriate library services to their members.

Since the introduction of library systems in 1971, no public library has left a library system to become a sole entity without any system support. Hopefully, this removes the perception that library systems are vendors; they are components of an essential library service infrastructure in our state. It would be like an access road running parallel to, but never connecting with, an interstate.

As we would with any complaints received regarding the policies, procedures, and actions of public libraries at the local level, the division would recommend that concerns regarding a system would be brought first to the director, and then to the system board if necessary. Any actions beyond that are outside the authority of DPI, as they do not pertain to Chapter 43.

Those who have contacted the MCPL board are not “proxies,” they are member libraries whose resources and capabilities hang in the balance on this decision. We know that an MCPL departure will greatly reduce their libraries’ access to materials, and that their expenses may increase significantly as a result. This ripple effect could force them to reduce their own services and offerings, both locally and regionally. Regardless of the decision this board ultimately makes, please respect that other member libraries are satisfied with their system services and do not want them to change, and that they have no control over a decision that will affect them directly. It may even affect them more than those in Marathon County, as MCPL will control its own decision and the outcome will be a net gain; the other libraries will not have that same experience.

When MCPL chose to conduct this exploration by way of a statewide task force, it allowed for input from various stakeholders and affected persons. The transparency of this type of process can be uncomfortable, because many viewpoints will come forward, but that is to be expected.

Did the PLSR have to account for the impact of any changes if libraries were to change systems, or if they were merged without the consent of a member library?

PLSR did not result in recommendations that mandated system mergers or required changes in system borders or system affiliation. The process did recommend a reduction in the number of library systems, by enhancing collaboration and reducing barriers to support voluntary changes in the system territory, with the ultimate goal of reducing the current number of public library systems. Per statute, two public library systems may merge only with the approval of each public library system board and the county boards of the participating counties.

The PLSR Steering Committee also included the following overarching directives for the division's implementation of the 7 recommendations:

- Service improvements must benefit library users;
- Use PLSR workgroup reports as frameworks for specific service improvements;
- Take action on recommendations with strong support;
- Service improvements must be soundly-implemented;
- Anticipate and study potential unintended consequences.

Does Chapter 43 require a library to take into account the impact of any changes brought onto system members if a system member chooses to join a different system?

To some degree, yes. Chapter 43 includes minimum requirements pertaining to system size and also provides the division with the authority to reject a public library system's plan for the alteration of its territory, under s. 43.13(2). This is to prevent library systems from coming too big or too small to provide equitable service.

In its declaration of policy, the Wisconsin legislature recognizes that libraries play a critical role in free access to information, that they are important to the democratic process, and that the most effective use of library resources can occur only through interlibrary cooperation. In 1987, the Attorney General opined that local libraries are a matter of statewide concern, and declared that home rule provisions would not justify local departures from Chapter 43 (76 Op. Atty Gen. 203(1987)).

While a library has a legal right to make this decision, the AG opinion advises public libraries to consider the statewide perspective. This places residents first, before differences among libraries. Concern across the library community is whether an MCPL departure moves the region closer to that goal, or pushes it farther away. But, while a decision to depart and remove the most concentrated population in the region is concerning, the authority ultimately rests with the library board and the county, as system membership is a matter of local control.