

Board of Trustees Meeting
Marathon County Public Library
September 16, 2019

Hello everyone. I am Marla Sepnafski, Director of the Wisconsin Valley Library Service.

On behalf of the WVLS staff and board, thank you for providing me this opportunity to share our concerns regarding MCPL Administration and this Board's consideration of the merits of joining the South Central Library System (SCLS).

I come before you today to share the WVLS point of view based on what we know so far regarding the important decision MCPL Administration is asking you to make about system affiliation in the months ahead. Let me stress up front that our point of view is based on review of information exchanged at MCPL Board meetings, conversations with colleagues, and comments from SCLS staff at a state-level meeting; and is without benefit of substantive conversations about concrete issues that you might have assumed were occurring behind the scenes.

First, the rationale behind MCPL Administration's motivation to leave WVLS remains obscure to the WVLS staff and Board.

- While there were some issues related to the Integrated Library System software expressed by MCPL Administration in the fall of 2018, WVLS staff is unaware of any unresolved or outstanding issues requiring our attention.
 - MCPL Board meeting minutes going as far back as January 2017 do not reveal either patron complaints about, or unresolved issues related to, WVLS services.
 - Minutes of the December 2018 meeting include the assertion that the library's challenges and needs are not aligned with the libraries in WVLS and that MCPL Administration was going to focus on "what [it] could get from a consortium that would be more aligned with what [it] need[s]."
 - The unique challenges and needs of MCPL were neither itemized in the minutes, nor were they communicated to the WVLS staff and Board.
 - What are MCPL's "unique" challenges?
 - What efforts have been made by MCPL with WVLS to address these challenges?
 - What issues remain unresolved so far as MCPL is concerned?
- My office and Ralph's office are in close proximity. We are not strangers and have maintained a collegial working relationship since 2011. One might expect that unresolved issues serious enough to provoke leaving one library system for another would not only be obvious to me and my staff, but openly discussed in a frank and professional manner. This has not happened.
- During a brief conversation on January 2, 2019, Ralph indicated to me that MCPL would be looking at other systems and considering its options. He mentioned that he wanted to challenge and motivate his staff, and that being more "aligned" with Madison Public Library was an idea being considered.
- At the time, it was not apparent that MCPL Administration's intent was to withdraw from the system as a resolution to their staff issue. WVLS has robust continuing education and training programs, and continuously partners with many other systems

across the state to provide these opportunities to a wide audience. In addition to formal opportunities, there are countless ways to challenge and motivate staff members through attendance at state and national conferences, engagement with other libraries, informal sharing of experiences and networking with colleagues from other Wisconsin libraries as well as through mentorship programs. Another suggestion would be to ask respected colleagues for advice.

- Ralph's desire for MCPL to be more aligned with Madison Public Library standards was not shocking. It behooves MCPL to expand its outreach to network with libraries with exemplary service to which they aspire, and Madison Public Library often leads Wisconsin public libraries in new initiatives and programs. That said, the geographical distance between Madison and Wausau remains unchanged whether MCPL is a member of WVLS or SCLS. It will not get any "closer" to Madison by leaving WVLS.

The information shared in director reports and minutes with the MCPL Board has been puzzling and offers no direction to WVLS with which to assist MCPL staff. To be clear, WVLS is not aware of any quality of service issues compelling MCPL Administration to think leaving WVLS is its only option.

Second, it is apparent MCPL Administration is leading this Board to endorse its predetermined view to leave WVLS and join SCLS absent complete information or a comprehensive decision making process.

- The December 2018 MCPL Board meeting minutes state: "*If we were part of the South Central Library System, their governance model is weighted and everyone based on their participation gets weighted voting. Every service they provide is ala-cart, so if you're not getting it, you're not paying for it. What I will be doing and also ask this board to do is start considering how we might be better served by being a member of another system. The PSLR group has released a draft of what their recommendations will be. I did include the website link in my monthly report. What I ask this board to do over the coming months is to review our different options. It does take about a year to merge with another library system. One of the challenges that we have is that our perspective, our needs as a library are not aligned with the libraries in our consortium. I am really going to focus on what we could get from a consortium that would be more aligned with what we need.*"

The statement that MCPL's needs are not aligned with the libraries in WVLS is, again, vague and doesn't identify unresolved service issues. While it is neither unreasonable nor unusual for resource libraries to feel their service issues and challenges are not comparable to those of the smaller libraries in their systems, there are several ways of addressing this issue. Again, networking with colleagues from like-sized libraries across the state, increasing staff members' professional social capital, and attending continuing education events are all more efficient/cost-effective, established options for MCPL to consider.

Then, too, there are resource libraries in other systems that make it their mission to provide leadership and collegial assistance to the directors of smaller libraries in their region, often finding that encouraging staff interaction, idea sharing and professional relationship building benefits all libraries regardless of size. Also, the comment

suggesting it takes approximately one year to merge a library with a new system is an estimate that doesn't consider the significant training and retraining required for library staff and patrons after a move. The destabilization of service and associated consequences would certainly expand well beyond one year.

- **Circulation Data and Pie Charts Comparing MCPL with Madison Public Library** were shared in the January 2019 MCPL Board meeting packet. The relevancy of this data is unclear and indeterminate. The fact that MCPL circulation is higher than the remaining libraries in WVLS is consistent with circulation data for systems across the state. This statistic is not unique to MCPL. Furthermore, should the circulations of each branch library be reported separately, the charts and the variance between MCPL and other WVLS member libraries would look very different. MCPL branch libraries remain the hub of their respective small communities and have much in common with other WVLS libraries of comparable size.
- **Collection Data Comparing Size of SCLS Collection to WVLS Collection** shared in the January 2019 MCPL Board meeting packet was interpreted to mean “*...that for every printed volume MCPL owns, it has system access to 3.3 print items in WVLS, where in South Central it would have access to just over 11 print items for each one MCPL owns.*” The intent of this comparison is ambiguous, since Marathon County residents have had the opportunity to receive items from any of the SCLS member libraries – or, for that matter from any other library in Wisconsin - for decades through the state’s interlibrary loan system, WisCat. Has MCPL experienced an increased number of requests from Marathon County residents for materials outside the V-Cat Consortium? During Project WIN discussions several years ago, one of the compelling comments made at the time against increasing the size of the ILS consortium was that there wasn’t enough interlibrary loan occurring outside ILS consortiums (approximately 10%) to warrant a change.
- **Comparison of Numbers of MLS-Degreed Staff in SCLS Versus WVLS** shared in the January 2019 MCPL Board meeting packet. Again, the relevancy of this data is not apparent, but the underlying implication that MCPL staff and patrons would receive better service is unconfirmed. As SCLS serves more libraries, and its member libraries serve more people in communities of a size requiring library directors with an MLS, it would make sense for SCLS to have more degreed staff than WVLS. However, it is important for the MCPL Administration and Board to know that WVLS and other systems often call on each other for guidance and counsel when addressing member library issues, and frequently collaborate to provide services. Thus, this comment, again, begs the question: what service needs are not being met?
- **February 2019 Meeting Minutes and 2018 MCPL Annual Report Regarding System Leadership.** The System Effectiveness Section of the 2018 MCPL Annual Report states: “*While the system is providing adequate support to MCPL, the 2019 System Plan for WVLS documents challenges faced, suggesting it to be reasonable for the library to review the potential for better service and support through another system, such as South Central.*” For at least the last 11 years, MCPL annual reports consistently indicated that WVLS provided effective leadership, and for almost as many years, WVLS has cited demographic variances in the system plan. The implication of the comments in this year’s report is exaggerated, and the justification to review the potential for better service is unsubstantiated. Also, the comments “*I do believe the WVLS consortium can gain the benefit in merging with the Northern Waters System and/or the Indianhead System. I think they can be stronger and better suited*

- *to serve the libraries that are in those consortiums*" in the February minutes are both presumptive and effectively irrelevant as a rationale for MCPL to leave WVLS. .
- ***"We're looking to join SCLS"*** was the comment made by the MCPL Administration during a visit with the T.B. Scott Library (Merrill) Director early in 2019. It was further suggested that this would be a good time for the Merrill Library to jump ship too.
- The September 2019 MCPL Board meeting packet indicated "Discussions are expected to continue throughout the fall as advantages and costs of membership in each of the systems are compared. A SCLS presentation is being planned for the MCPL Board."

While library boards should expect library administration to make recommendations and offer suggestions as a guide through any decision-making process regarding library services and policies, the minutes of MCPL board meetings do not indicate that this Board has been made aware of the state statute which authorizes MCPL to join ANY public library system adjacent to Marathon County. Why haven't the benefits of the IFLS Library System (headquartered in Eau Claire) and Nicolet Federated Library System (headquartered in Green Bay) been researched and shared with this Board if the administration's perceived deficit of system support has reached critical mass? Shouldn't a process of this magnitude provide for more than one myopic option and for a comprehensive service assessment?

Third, a merger of MCPL with SCLS has potential to undermine the processes outlined in the *PLSR Delivery Work Group Report and Steering Committee Recommendation Report* for more efficient and affordable statewide delivery. In April ~~March~~ 2019 SCLS presented a proposal to MCPL, IFLS Library System, Northern Waters Library Service and WVLS to replace Waltco for Marathon County deliveries. Waltco has been used exclusively by WVLS for intra-system delivery for almost 25 years, and additionally is contracted by SCLS to make its inter-system deliveries to NWLS in Ashland. While SCLS is paid by Wisconsin's public library systems to do inter-system deliveries, all systems in the state either contract with a different vendor for intra-system delivery (like WVLS) or do their own deliveries.

In post-meeting correspondence to SCLS and MCPL, both Maureen Welch, IFLS Library System representative and member of the former PLSR Delivery Workgroup, and I shared reasons for rejecting/repudiating the proposal. Our concerns included:

- The tentative costs of contracting with SCLS as delivery provider were remarkably higher than current costs (Note: the high cost of the SCLS proposal was also a concern raised by their member libraries at an April 2019 SCLS Delivery Committee meeting.)
- The benefit to WVLS member libraries of contracting with SCLS as delivery provider was not discernible to IFLS Library System or WVLS.
- The proposal was silent regarding how Marathon County becomes more of a delivery hub than it already is. Currently, the Waltco terminal in Wausau efficiently and affordably moves materials between WVLS and delivery hubs in IFLS, NWLS, NFLS/OWLS and SCLS.
- The intent for Marathon County to be a delivery hub was not mentioned in the *PLSR Delivery Workgroup Report* as the first step needed to improve the state delivery network.

- The SCLS recommendation for a “trial [implementation] period” places considerable risk to member libraries should it fail. While the proposal may, if put into play, resolve some of SCLS’s more immediate courier operation issues in the short run, how WVLS and our member libraries benefit in the long run remains startlingly unclear.
- Implementation of the proposal has potential to undermine contracted delivery services in the state. The *PLSR Delivery Workgroup Report* did not recommend that SCLS take over courier services in other parts of the state. **Rather, it specifically cited the mix of contracted delivery and system run delivery services as one of the strengths of the current delivery network.**
- Disregard of PLSR recommendations has potential for unintended consequences. The *PLSR Implementation Strategy* recommended the appointment of a statewide project manager to take a holistic view of the process and to ensure implemented recommendations benefit all systems and libraries. This approach supports the PLSR Delivery Workgroup’s vision and is sound. There is no current crisis to WVLS member libraries that would suggest WVLS, MCPL and SCLS should not wait for DPI to initiate delivery service target activities outlined in the *PLSR Steering Committee Recommendations Report*.

Given that MCPL Administration dropped several courier stops in 2018 citing budget challenges and dropped even more in September 2019, I would have expected the high cost of the SCLS proposal to be prohibitive. Also confusing, months before the costs of the SCLS proposal were presented, the February 2019 MCPL Board meeting minutes shared “*There is no negative effect for us, we will benefit from the state to make this happen. This will however affect WVLS, but in the end it will benefit every library. All the parties that will be affected are aware of what we are talking about and [what] the potential outcome could be.*” How would MCPL Administration know any of this? Given that a SCLS proposal had not yet been shared, and a detailed service inventory of key metrics had not yet been developed, how does MCPL and “every library” benefit? Who are “the parties that will be affected” and precisely what are they “aware of?”

Here is another puzzling contradiction: MCPL Administration has consistently championed the PLSR process, specifically its potential to remove old ways of doing things and recommendations to use outside experts/professionals to implement outcomes. However, during a state Interlibrary Loan meeting last month at a session on statewide delivery the presenter, a SCLS Courier Representative, made this statement: “***MCPL is looking to join SCLS and steps have been taken to make that happen! When/If it happens, Marathon becomes a hub.***” Absent any indication in the MCPL Board minutes, WVLS cannot help but question what unreported internal and Board decisions have been made.

The prohibitive cost of the SCLS proposal, as well as the incompatibility of its approach with the *PLSR Steering Committee Recommendations Report*, has both the WVLS and IFLS staffs questioning why there is an overt and aggressive charge to replace Waltco with SCLS for Marathon County deliveries? Why not wait for a more thorough review by experts, and an objective implementation process that guarantees the most affordable delivery possible for all systems and libraries across the state? The answer may be that SCLS would rather not go through a bidding process should that be a component of any restructured delivery model. Delivery service in the state is highly competitive and challenging to sustain without growth

and new customers. What would happen to the SCLS delivery operation if a different courier service were able to outbid them?

Because it benefits SCLS to absorb Marathon County into its delivery network, I would anticipate any proposal by it to MCPL to join its system to be very lucrative and highly incentivized to ensure success.

Fourth, there will be unintended consequences. A decision by the MCPL Board to leave WVLS will have devastating results not only for WVLS, but for all libraries and systems with which we collaborate to provide services.

The known consequences are:

- Elimination of approximately \$400,000 in revenue to provide services and support to seven counties in central and northern Wisconsin.
- Significant and devastating destabilization of service for all libraries in the current WVLS 7-county service area. According to the rules for systems in State Statute, WVLS, will implode, forcing the remaining libraries in 24 communities and 6 counties to scramble to find another system to join can remain a system.
- Destabilization of service for 100 libraries in 25 counties in the northern half of Wisconsin in the area of information technology and technology support as WVLS is a member in a three-system IT collaboration with IFLS Library System and Northern Waters Library Service.
- Destabilization of courier service in the IFLS Library System, NFLS and OWLS.
- The probable elimination of employment for all ~~some~~ WVLS staff.

Marathon County has an important legacy in Wisconsin library history, as well as the development of library service in north central Wisconsin.

During the pre-public library system development phase in the 1960s, the Wausau Public Library and Marathon County served as the regional hub for a reference cooperative in which a large library with an extensive reference collection would provide reference services beyond its service area to the smaller, more rural library service communities that surrounded it. As what we might now call a beta site to test this service, the project was funded through the national Library Services Act (which was later known as LSCA and now known as LSTA). In this regard, the Wausau library served as the very first resource library in Wisconsin and has been the resource library for the Wisconsin Valley Library Service area for almost 60 years.

Over the almost 40 years I have been employed at WVLS, the WVLS staff and I have had the good fortune to work with six MCPL Directors - going all the way back to Wayne Bassett who directed both MCPL and WVLS, followed by Sandra Wilson, Jim Stettina, Mary Bethke, Phyllis Christensen and now Ralph Illick. Throughout the decades of our partnership, WVLS also has had the pleasure to work with talented MCPL staff members to improve services not only to Marathon County residents, but also to all residents and libraries in our 7-county service area.

Of course, there have been issues to work through over the years. But historically, when issues became problems, MCPL representatives and WVLS representatives would use a substantive process to seek and effectuate a resolution. While the process wasn't always comfortable or even pleasant, and didn't always guarantee desired outcomes, there was a

mutual recognition and understanding of the needs and challenges of both parties. We were always able to persevere and preserve our effective working relationship. This history and process is consistent and compatible with what occurs between other systems and their resource libraries when problems occur.

Currently, WVLS has excellent working relationships with several MCPL staff members.

Examples include:

- **Ralph Illick**'s participation on the Library Advisory Committee is helpful to the WVLS staff and Board when deciding service priorities.
- As a member of the WVLS/V-Cat Steering Committee, **Leah Giordano** helps draft an annual V-Cat budget to present to the V-Cat Council and WVLS Board of Trustees.
- WVLS Continuing Education Consultant Jamie Matczak welcomes feedback and expertise from **MCPL branch managers** and **Mary Stachowiak** on courier practices and procedures. She also collaborates with Library Marketing Specialist **Dan Richter** on tools to assist MCPL in its marketing and promotional efforts.
- WVLS ILS Administrative staff appreciate **Chris Luebbe** and **Pat Schmitt**'s leadership on the V-Cat Bibliographic/Interface Committee and their expertise on keeping our V-Cat database up-to-date and working smoothly, and their willingness to teach others in our collaborative environment.
- The leadership of **Kitty Roesler** and **Mary Stachowiak** to the V-Cat Cooperative Circulation Committee is always helpful and is especially advantageous as the V-Cat Council strives to provide patron-focused offerings and collaboration.
- **Kris Adams Wendt**, WVLS Advocacy Consultant, facilitated several LSTA grants with MCPL staff that provided MCPL libraries with hearing loops at the service desk, automatic door openers, and other assistive devices and furnishings. She enjoys coordinating an annual Library Legislative Day delegation from WVLS libraries in which **Ralph Illick** has been a consistent participant.
- WVLS Public Library Consultant **Anne Hamland** works closely with MCPL staff from children's, adult, and reference services. MCPL staff have presented numerous sessions during youth, teen, and adult services workshops; led discussion at youth meet-ups on intellectual freedom and material challenges; and used their experiences to consult with WVLS member librarians for the past decade.
- **Julie Kinney**'s input has been vital to WVLS ILS and Database Support Specialist Rachel Metzler and the WVLS Database Advisory Group efforts to improve WVLS database offerings for all libraries.
- WVLS CIO Joshua Klingbeil enjoys working with **Matthew Derpinghaus** and **Benjamin Deitz** to discuss technology strategies and help implement meaningful solutions to MCPL's technology needs.
- **Katie Zimmerman** contributes extensive knowledge as a state purchaser for the Wisconsin Digital Library while also serving as Chair of the WVLS OverDrive Advantage Selection Committee. Her historical and practical knowledge of state and local purchasing are invaluable for WVLS members and libraries across the state.
- Others with whom WVLS has had opportunities to connect include, but are not limited to: **Taylor Weinfurter**, **Kate Sullivan**, **Chad Dally**, **Laura Lawler**, **Tom O'Neill** and **Ben Krombholtz**. Conversations with these colleagues have provided WVLS staff with a great outlet to "talk shop," bounce around ideas, and gain inspiration.

I hope you find the information I provided compelling. Going forward, this board has decisions to make and questions to address. Does it support MCPL Administration's intent to join SCLS based on information shared with the board to date? Does it also investigate the services available from the systems adjacent to Marathon County? Or, does it first ensure MCPL Administration's reasons for leaving WVLS are justifiable and understood by all parties impacted by such a decision, and that resolutions to well defined problems have been exhausted? Or, does it wait to see how MCPL might benefit from implementation of PLSR recommendations for improved service across the state?

MCPL and WVLS leadership have an obligation to the libraries and systems that we collaborate with to ensure all service issues have been identified and opportunities for improvement are implemented and tested, before advancing the narrowest solution thus far presented. Ultimately, I hope this presentation gives the MCPL Board pause to reevaluate and reassess the current trajectory, to identify any unmet needs of Marathon County residents that have prompted administrative assumptions, and to seek solutions within its current system.

If this Board sees the value, WVLS staff and trustees are willing to form a committee with MCPL counterparts to create a structured, objective analysis of MCPL Administration's desire to more closely align with Madison Public Library, to identify the challenges of maintaining membership in WVLS, and to develop a strategic process to achieve its goals. Perhaps colleagues from other systems and resource libraries could be invited to these meetings to share their best practices and to vet solutions.

WVLS strives to provide the best service to member libraries and takes this matter very seriously. Given the significance of what is being proposed by MCPL Administration, Wisconsin's library users and the wider library community deserve more from MCPL and WVLS leadership.

Thank you for your time and consideration.