



October - December 2022

WVLS EXPECTATIONS & ASSESSMENTS REPORT

*WVLS meets expectations.
Final report begins on page 2*

COMPLETED PROJECTS

- ✓ WVLS V-Cat ILS Evaluation and Review Committee established a process to review ILS products.
- ✓ WVLS surveyed MCPL staff for their continuing education needs
- ✓ WVLS completed its 2022 Fiscal Report
- ✓ WVLS partnered with the UW-Law School Libraries to produce training videos specific to MCPL professional development requests.
- ✓ WVLS and V-Cat Council implemented a weighted voting system.
- ✓ WVLS provided system orientations to new MCPL staff members.
- ✓ WVLS created a trustee orientation video for new MCPL board members.
- ✓ WVLS organized the annual MCPL staff in-service day.
- ✓ WVLS invited MCPL to participate on WVLS workgroups and committees.
- ✓ WVLS and V-Cat libraries addressed 14,300 database records without subject headings.
- ✓ WVLS launched a new user-friendly public catalog.



WLA Scholarship

The WVLS scholarship recipients had a great time learning and networking at the WLA Conference November 1-4 in Lake Geneva. **MCPL-Mosinee Branch Coordinator Sarah Moscatello, MCPL-Hatley Branch Coordinator Heather Bain**, Westboro Public Library Director Melissa Highfill, and Thorp Public Library Director Carsyn Soderstrom are pictured above between sessions at the Grand Geneva Resort & Spa.

In a note about the conference, Sarah said "... this really was such a fantastic experience that made me comfortable and excited to apply for more scholarships going forward!" *Details in Appendix D.*

- ✓ WVLS awarded MCPL a \$10,000 Collection Development Grant.
- ✓ WVLS offered MCPL \$2,160 in Summer Library Program Performer Grants.
- ✓ WVLS offered MCPL \$11,825 in scholarship opportunities.
- ✓ WVLS assisted MCPL in finding and applying for grant opportunities.
- ✓ WVLS assisted libraries with weeding outdated materials.
- ✓ WVLS met frequently with MCPL staff to discuss service goals.

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ADDITIONAL INFORMATION

[WVLS Expectations Report; March 2022](#)

[WVLS Expectations Report; June 2022](#)

[WVLS Expectations Report; September 2022](#)

[WVLS Report to MCPL Board; November 2022](#)

EXECUTIVE SUMMARY

The December 2022 WVLS Expectation Report outlines the projects completed / progress made on recommendations the MCPL Board of Trustees requested WVLS complete in 2022. Following are highlights of the more significant accomplishments and support the WVLS Team has provided to MCPL covering the months of October – December 2022.

Joint ILS Consortium Exploration Launches

A [Joint ILS Consortium Exploration Project](#) collaboration between the Northern Waters Library System and WVLS is now underway. This project, which is now called NICE (Northern Wisconsin ILS Consortium Evaluation), will determine the value and feasibility of merging two integrated library systems and their respective ILS consortia. WiLS will serve as an outside consultant to facilitate and guide the project's process. MCPL will be intimately involved in the process as A. Johnson is on the 10-member NICE Team. The project involves three processes:

- Phase 1: Development of Foundational Principles (November – December 2022)
- Phase 2: Information Gathering (December 2022 – April 2023)
- Phase 3: Report Creation (May – June 2023).

The overarching goals of a joint ILS consortium are to provide increased ILS administrative support to member libraries and improved service to library users.

ILS Vendor Demonstrations Underway

At the September 8 meeting, the V-Cat ILS Evaluation and Review Committee selected three products for demonstrations and further consideration: The Library Corporation's Carl, Koha supported by Bywater Solutions and Innovative's Sierra. During meetings in September and October, the committee set the format and schedule for the demonstrations. Demonstrations of each product will take place over two consecutive days and be broken out by modules. Demonstrations will be recorded to allow as many staff as possible to review the presentations. All library staff using Sierra have been invited to demonstrations or view recordings and provide feedback. Koha and Carl demonstrations are complete, and recordings have been provided. Sierra demonstrations are scheduled for December 14 and 15.

Advocacy Support and Consulting Provided

WVLS provided MCPL with a list for each of its titles recently under reconsideration which showed what libraries in Wisconsin own the titles and where in the libraries' collections the titles are shelved.

On November 9, WVLS submitted a letter and an accompanying infographic to the Marathon County Board of Supervisors requesting that funding for MCPL be preserved in the 2023 county budget. The document is shared as Appendix F at the end of this report.

On October, K. Wendt consulted with MCPL Services Manager K. Sabelko regarding the pros and cons of MCPL staff serving as witnesses for absentee ballot voters under current WI Election Commission rules resulting from recent court cases. It was suggested that K. Sabelko have conversations with the Marathon Co. Clerk and Corporation Counsel as she considers potential implementation of this service in 2023. K. Wendt offered to consult further if additional help was needed.

WVLS Partners with Wisconsin State Law Library to Produce 5-Part *Digital Bytes* Series

WVLS and the Wisconsin State Law Library (WSLL) have produced three training videos in a 5-part Digital Byte series since the collaboration began earlier this year. Topics include:

- “[Navigating the Legal Reference Interview](#).” In this first video of the series produced in August, WSLL’s Web Services Librarian **Carol Hassler** addresses how to handle legal reference questions.
- “[Discovering Legal Resources](#).” Hassler shares quick tips on legal research in the second video of the series.
- “[Access to Justice](#).” The third video in the series features WSLL’s **Elizabeth Manriquez** discussing the Justice Gap, who it impacts, and how libraries can assist.

Digital Bytes, short training sessions produced by WVLS staff and colleagues from other libraries, are available on the WVLS website at <https://wvls.org/digital-bytes/>.

MCPL Staff In-Service Day

J. Matczak hosted a staff in-service for MCPL staff on Friday, September 16. MCPL locations were closed to the public, and over 40 MCPL employees participated. The event consisted of a morning presentation on safety and security, followed by role playing. Meditation in the afternoon was led by WVLS Trustee **Mandy Wright**. The events of the day were well received. MCPL Circulation Services Lead/Library Specialist **Kitty Roesler** said the day was fun and worthwhile. “*WVLS did a great job coordinating a full day workshop with Dr. Steve Albrecht, who shared extensive information with us. I thought the role-playing exercises were very helpful with problem solving challenging situations,*” she said.

Annual WVLS Youth Services Workshop

Nearly 20 librarians serving youth gathered December 2 at the Marathon County Public Library’s Wausau Community Room to celebrate summer programs and listen to guest speakers Argyle Public Library Director Sarah Kyrie and Westboro Public Library Director Melissa Highfill talk about their program successes and creative outreach. The workshop was an excellent opportunity for inspiration and discussion that provided sessions on small group sharing and large group brainstorming. Workshop evaluations indicated that many felt energized, inspired, and encouraged as they left to get lunch in small groups or return to their libraries. “It was really good to get connected to others in person, [there is] value in community connections,” said one attendee. Another said, “Seriously, it was a great way to hear what worked well for other libraries and think about how to use those ideas at my library.”

WVLS Offers Scholarships to Attend WEMTA Conference

WVLS scholarships are available to public and K-12 school library staff to attend the 2023 WEMTA (Wisconsin Educational Media and Technology Association) Conference in Rothschild, WI on February 5-7, 2023. Valued at \$1,000, the WVLS 2023 WEMTA Conference Scholarship will cover a one-year WEMTA membership, conference registration, two nights conference lodging, mileage reimbursement, and meals at per diem rates when a conference meal is not provided. Information about the 2023 WEMTA Conference may be found on the WVLS website at WVLS website at wvls.org/scholarships-and-grants/, [here](#). The deadline to submit a scholarship application is **December 9**.

Upcoming Opportunities

- **“The Reluctant Library Advocate” [Fall Webinar Series](#)** coordinated through the 4-system collaboration of WVLS, IFLS Library System, Southwest Wisconsin Library System, and Northern Waters Library Service focuses on library advocacy is underway. The third session in the series will be held on Wednesday, December 7, 10:00 a.m.
- **Wild Wisconsin Winter Web Conference:** Fourteen sessions are planned for the 11th Annual Conference on January 25-26, 2023. Conference tracks include Management, Marketing, Sustainability and Reference/Reader’s Advisory. The 2023 lineup features renowned speakers such as Rebekkah Smith Aldrich (Mid-Hudson Library System, New York), Angela Hursh (Novelist), David Lankes (University of Texas), Trenton Smiley (Capital Area District Libraries, Michigan) Stephanie Sendaula (LibraryLinkNJ) and many more! To learn more about the conference, and to register, visit wildwiscwinterweb.com
- **Wisconsin Library Association’s** Library Legislative Day – February 7.

Thank you for allowing WVLS to share ways in which WVLS and MCPL are partnering to support the library and advance its service goals! The WVLS Team appreciates the sincere effort by MCPL Board members, administration and staff contributing to mutually enhanced communication, collaboration, and inter-agency relationships during 2022. We look forward to maintaining a strengthened partnership for the future.

MCPL and WVLS Staff Guide

Marathon County Public Library Staff Mentioned in this Report

Bauer, James	Library Specialist
Carlson, Ollie	Page Team Lead
Giordano, Leah	Director
Hahn, David	IT Technician
Hetzel, Ashley	Library Assistant
Hornbeak, Tara	Youth Collection Development Specialist
Johnson, Alexander	Library Support Services Manager
Johnson, Jailin	Library Specialist
Kinney, Julie	Adult Services Librarian
Krombholz, Ben	IT Technician
Luebbe, Chris	Library Specialist
Lutz, Elizabeth	Library Specialist
Martell, Stephanie	Business Specialist
Moscattello, Sarah	Mosinee Branch Coordinator
Richter, Dan	Library Marketing Specialist
Roesler, Kitty	Circulation Services Lead
Sabelko, Katelyn	Library Services Manager
Schmidt, Pat	Former Library Specialist
Stachowiak, Mary	Former Support Services Team Lead
Sullivan, Kate	Adult Collection Development Specialist
Weinfurter, Taylor	Youth Services Librarian
Wilde, Heather	Administrative Coordinator

Wood, Laura Branch Services Lead

Wisconsin Valley Library Service Staff Mentioned in this Report

Ben Khalifa, Achraf	Former Technology Support Specialist
Hafemeister, Susie	Administrative Assistant
Hamland, Anne	Public Library Services Consultant
Klingbeil, Joshua	Chief Information Officer
Machones, Sherry	Inclusive Services Consultant
Matczak, Jamie	Education Consultant
Metzler, Rachel	ILS and Database Support Specialist
Sepnafski, Marla	Director
Walenton, Brenda	Finance and HR Specialist
Wendt, Kris Adams	Local and State Advocacy Consultant
Zimmermann, Katie	ILS Administrator

2022 WVLS EXPECTATIONS ASSESSMENT WORKSHEET

General System Expectations (Wisconsin Statutes 43.24[2])

Reference, Referral, and Interlibrary Loan

- Referral or routing of reference and interlibrary loan requests from libraries within the system to libraries within and outside the system.

Continuing Education & Consultation

- In-service training for participating public library personnel and trustees and professional consultation services to participating public libraries.
- Professional consultant services to participating public libraries.

Delivery

- Electronic delivery of information.
- Physical delivery of library materials to participating libraries.

Service Agreements

- Service agreements with all adjacent library systems.

Other Service Programs

- Any other service program/s 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.

Inclusive Services

- Promotion and facilitation of library service to users with special needs.

Other Types of Libraries

- Cooperation and continuous planning with other types of libraries in the system area which results in agreements with those libraries for the appropriate sharing of library resources to benefit the clientele of all libraries in the system area.

Library Technology and Resource Sharing

- Planning with the division and with participating public libraries and other types of libraries in the area in regard to library technology and the sharing of resources. By January 1, 2000 and every 5th January 1 thereafter, the public library system shall submit to the division a written plan for library technology and the sharing of resources.
 - Technology/Network
 - ILS Administration

Administration

- Ensure that the library system operates in accordance with Chapter 43 of the Wisconsin Statutes and other related Wisconsin and Federal laws.
- Continue to participate in the statewide PLSR project.

MCPL SYSTEM TASK FORCE SPECIFIC ITEMS AND ADDITIONAL SUPPORT

Increase opportunities to collaborate with like-size libraries

- **Wisconsin Valley Library Service (WVLS) will work with Marathon County Public Library (MCPL) to create opportunities to collaborate with similar-sized libraries state-wide.**

ACTIVITIES UPDATE

OCTOBER – DECEMBER 2022

J. Matczak connected with H. Bain and S. Moscatello at the Wisconsin Library Association (WLA) Conference in Lake Geneva to ensure conference needs and expectations were met. S. Moscatello indicated to J. Matczak that the WLA Conference had a comfortable atmosphere and that everyone she had met was welcoming. Prior to the conference, Matczak met with all conference scholars virtually to review conference agendas, travel arrangements and final assignments.

RESULTS FROM THIRD QUARTER 2022 REPORT

JULY – SEPTEMBER 2022

J. Matczak will connect MCPL staff attending the statewide WLA Conference in Lake Geneva on November 1-4 with colleagues from similar-sized libraries.

RESULTS FROM SECOND QUARTER 2022 REPORT

APRIL – JUNE 2022

On April 29, 2022, J. Matczak connected L. Giordano on ways WVLS can work with MCPL to create opportunities to collaborate with similar-sized libraries state-wide. L. Giordano contacted key MCPL staff members for feedback and shared responses with J. Matczak via an email on May 10, 2022. J. Matczak responded with additional ideas that will be coordinated throughout 2022.

- **WVLS will facilitate partnerships between key players and mentors at similar-sized libraries.**

RESULTS FROM THIRD QUARTER 2022 REPORT

JULY – SEPTEMBER 2022

On August 31, 2022, J. Matczak facilitated a field trip with MCPL's Youth Services Librarian T. Weinfurter and Branch Services Lead and Rothschild Branch Coordinator L. Wood to the Brown County Library (BCL) in Green Bay. BCL, a member of the Nicolet Federated Library System, is similar to MCPL in that it's also a consolidated county library system with a central location and eight branches. Likewise, BCL is the resource library for its public library system.

T. Weinfurter and L. Wood received a library tour and met with BCL's Deputy Director E. Rogers and Youth Services Manager K. Guzek. Before the visit, each person was asked to think about responses to several questions, such as:

- What is an upcoming project or service you are working on?
- Besides not having enough time, what is the most challenging aspect of your job?
- What is the most rewarding part of your job?
- What tools do you use or have discovered to make your work more efficient?

After lunch, T. Weinfurter and L. Wood received a library tour of the BCL Weyers-Hilliard Branch. J. Matczak sent out a short survey to assess the visit to make necessary adjustments for the next trip with MCPL staff, to take place this fall.

RESULTS FROM SECOND QUARTER 2022 REPORT

APRIL – JUNE 2022

Introduction to Colleagues at Similar-Sized Libraries

J. Matczak networked with colleagues at the Wisconsin Association of Public Libraries (WAPL) Conference in Pewaukee on May 11-13 on possible partnerships. On May 17, she approached L. Giordano with the idea of WVLS planning a MCPL staff field trip to a library similar in size to MCPL. L. Giordano supported that idea, and implementation will take place sometime in the next couple of months.

RESULTS FROM FIRST QUARTER 2022 REPORT

JANUARY – MARCH 2022

March 2022

A. Hamland connected T. Weinfurter with La Crosse Public Library's Early Literacy Librarian to learn ways in which the La Crosse Public Library is serving Afghan and other underserved, non-English speaking populations. B. Newberry provides outreach services for Afghan refugees at Fort McCoy among other early literacy programs and services.

Mentorship Opportunity

Upon being hired as the MCPL Director in November 2021, Leah Giordano was invited to participate in the WVLS mentorship program. WVLS paired Giordano with the Brown County Library Director Sarah Sugden. The Brown County Library is like MCPL in that it, too, is a consolidated county library with eight branches (and a bookmobile). Also, Brown County is a resource library for the Nicolet Federated Library System headquartered in Green Bay.

In January 2022, WVLS facilitated an introductory discussion between L. Giordano and S. Sugden that addressed goals for the mentorship. In February, S. Sugden, traveled to Wausau for an in-person meeting with Giordano and to receive a tour of the MCPL Wausau branch.

Resource library directors meet online each month to check in with each other, share newsworthy activities, and respond to each other's questions. As part of the mentorship experience, S. Sugden introduced L. Giordano to this opportunity.

Improve communication between WVLS & MCPL

Over the years, certain MCPL staff and WVLS staff have maintained generally positive, functional communications via email, interpersonal ad hoc meetings (i.e., “hallway conversations”), and traditional scheduled meetings regarding cooperative projects, service support, and service area consultation. Under the interim and subsequent full direction of L. Giordano, WVLS has observed a marked upturn in the volume of MCPL staff-initiated support requests and consultation inquiries. L. Giordano’s leadership has enabled an increase in the reporting of unexpected issues and a corollary increase in the general visibility of those experiences which then has led (and empowered) MCPL and WVLS technology and ILS support teams to engage with each other more closely and regularly. Coupled with the rise in scheduled meetings, there has also been more direct technology support and related consultation occurring ad hoc between help desk communications, office walk-ins (both directions), and emails.

- **WVLS will schedule monthly meetings with MCPL to discuss service goals.**

ACTIVITIES UPDATE

Meetings: OCTOBER – DECEMBER 2022

In 2022, J. Matczak reached out to D. Richter monthly to discuss potential MCPL activities and projects to be featured in the WVLS monthly newsletter, which is shared with WVLS members, trustees and public librarians statewide.

During this quarter, M Sepnafski met frequently with L. Giordano to discuss policy, procedures and public messaging regarding the recent requests for reconsideration of library materials received and the library’s 2023 budget.

November 2, 2022

J. Klingbeil reached out to A. Johnson to provide updates regarding the awards of additional ECF support for the Mobile Hotspots project covering existing and some additional devices and service plans through 2023.

November 13, 2022

J. Matczak reached out to S. Martell to ask if the MCPL branch libraries would prefer to receive delivery service on Friday, November 25, a non-regularly scheduled delivery day. MCPL branches receive delivery service every Monday, Tuesday, and Thursday, and service was closed on Thursday, November 24 due to Thanksgiving.

November 1, 2022

K. Zimmermann reached out to L. Giordano, A. Johnson, and K. Sabelko to set up an annual listening session where MCPL Team Leads and MCPL Branch Coordinators could share needs and concerns related to the V-Cat Consortium.

October 27, 2022

J. Klingbeil reached out to A. Johnson to review the status of the ECF supported Mobile Hotspots project and to discuss additional support applications in-process.

RESULTS FROM THIRD QUARTER 2022 REPORT

Scheduled Meetings: JULY - SEPTEMBER 2022

September 12, 2022

J. Klingbeil initiated the technology consultation process to coordinate near and long-range technology services review and planning. Intent is to focus on two tracks: 1) the immediate project and support needs for operations through 2023 [support existing short-term planning]; 2) the long range holistic strategic visioning, operational architecture, and suitable fiscal planning to achieve long range needs and goals for 2024 and beyond.

September 8, 2022

S. Machones reached out to L. Giordano to enquire about how best to provide an Inclusive Services Orientation for her and/or her staff.

September 6, 2022

K. Zimmermann provided a V-Cat orientation for K. Sabelko.

September 5, 2022

M. Sepnafski met with L. Giordano to talk about county library plans, and other administrative matters.

August 23, 2022

J. Klingbeil published a Mobile Hotspots Request survey asking which libraries might be interested in receiving grant-supported mobile hotspots to lend to underserved patrons. MCPL was allocated 18 of 70 devices (2 per library location within WVLS). Devices were being catalogued and staged for use by member libraries during early September.

August 16, 2022

A. Hamland met with L. Giordano to provide information regarding WVLS services in Youth, Teen, and Adult Consulting and a tour of the WVLS website as part of the orientation for new public library directors.

August 11, 2022

K. Zimmermann met with J. Johnson to provide training and an overview of opportunities for featuring library materials through lists, on MCPL's website, online catalog, and via email or social media.

August 10, 2022

J. Klingbeil shared the initial draft of the 2024 planning guide details for technology budget planning (during the 2024 budget planning season in 2023) with the Library Advisory Committee. J. Klingbeil responded to a follow up inquiry from A. Johnson regarding predicted cost changes in an email exchange indicating that the changes were forecasts based on current operational awareness and potential service adjustments between now and 2024. Such changes would likely offset savings by replacing other 3rd-party services.

July - August, 2022

During July and August, J. Klingbeil worked with D. Hahn and a 3rd party vendor to support network IP address schema and configuration updates coinciding with network equipment replacement/upgrades effected at MCPL Wausau headquarters and all 8 MCPL branch locations.

RESULTS FROM SECOND QUARTER 2022 REPORT

Scheduled Meetings: APRIL - JUNE 2022

June 2022

J. Klingbeil met with D. Hahn to review MCPL's wireless access point management system and learn more about MCPL's local servers and general IT short term plans. J. Klingbeil is putting together a slate of virtual servers for D. Hahn to utilize with full administrative access for testing or production use. J. Klingbeil will be working to schedule additional short term "immediate need" meetings with D. Hahn and long term "strategic planning and technology budget planning" meetings with MCPL team members during the 3rd quarter of 2022.

A. Hamland met with T. Weinfurter to continue conversation about summer library programming, specifically outdoor programming and virtual programming offered via the Beanstack website and smart device app. The discussion generated a list of ideas to incorporate into 1,000 Books Before Kindergarten and Summer Library Programs in addition to fall or winter reading challenges encouraging visits to the physical library, interacting with the literacy center, and consulting reader's advisory lists for book choices.

May 2022

M. Sepnafski met with L. Giordano to prepare for the annual cross-border circulation meeting with representatives from the Marshfield Public Library and South Central Library System.

J. Klingbeil sent D. Hahn information on IP address mappings reserved for MCPL within the LEAN WI partnership's Wide Area Network (WAN) to be shared with the 3rd party contractor assisting MCPL with branch and headquarters router replacement and configuration projects. As part of the hardware replacement projects, the contractor is helping MCPL update its IP addressing schema to be more compatible with the City-County IT Commission (CCITC) and WVLS WANs, both to which MCPL's network interconnects.

April – May 2022

In April and May, K. Zimmermann had multiple telephone and email conversations with B. Krombholz, J. Kinney, and other MCPL staff to improve Aspen Discovery record display, user experience, and website indexing.

April 2022

M. Sepnafski met with L. Giordano to discuss an orientation for staff and trustees that provides information about WVLS, and to consider additional websites, blogs, and listservs in which to share MCPL employment opportunities.

J. Matczak met with L. Giordano to discuss the staff in-service in September and additional online locations to share MCPL job posts.

Following MCPL Aspen training in March, K. Zimmermann reached out to K. Sullivan and T. Hornbeak with additional information about Aspen Materials Request functionality to meet MCPL goals of streamlining the purchase suggestion process and limiting the number of requests per patron each year. K. Zimmermann included an invitation to set a meeting to begin the setup process.

RESULTS FROM FIRST QUARTER 2022 REPORT

NOVEMBER 2021 - MARCH 2022

March 2022

K. Zimmermann met with J. Kinney, K. Sullivan, T. Hornbeak and other members of the MCPL Library Services team to ensure that the desired collections and materials would be featured in the Aspen interface and provide an overview of opportunities for featuring library materials through lists, browse categories and collection spotlights.

A. Ben Khalifa went onsite to multiple MCPL branches as part of a cooperative networking configuration documentation project detailing local network equipment and connections. D. Hahn was originally planning to travel with A. Ben Khalifa during the initial field visits but was unable to participate. A. Ben Khalifa was able to reach out to Branch Coordinators or available branch staff to coordinate travel and keep the initial schedule on track.

K. Zimmermann facilitated Aspen Materials Request / Purchase Suggestion training. K. Sullivan and T. Hornbeak attended.

February 2022

K. Zimmermann met with M. Stachowiak to gain a better understanding of handling invoices in Sierra Acquisitions to pursue solutions with Innovative during Acquisitions training sessions in March.

J. Klingbeil met with S. Martell to further review WiscNet and WCAN memberships and services, the respective needs of MCPL and WVLS as cohabiting organizations with interconnected networks, and options available for future operations and budget planning.

K. Zimmermann met with A. Johnson and members of the MCPL Support Services and Library Services teams to discuss the MCPL circulation policy and Sierra settings to automate blocks on patron records.

J. Klingbeil and A. Ben Khalifa met with A. Johnson and D. Hahn to review and discuss MCPL Branch networking (specifically regarding "Charter" branches) in the dual context of general long-term planning and more specifically regarding intermittent network connectivity related issues affecting the functionality of the Sierra Desktop Application (SDA).

D. Hahn sent the WVLS Technology Team copies of the current configuration files for routers at each of the “Charter” branches. WVLS and MCPL will be working together to review the configurations and develop an updated plan for replacing the legacy routers running at the branches with newer equipment and configurations.

K. Zimmermann met with B. Krombholz and J. Kinney eight times in this four-month period to ensure Aspen Discovery was configured to desires of MCPL staff. More information is included later in this report.

December 2021

J. Klingbeil met with S. Martell, A. Johnson, and D. Hahn to begin the process of review and analysis of technology and networking services utilized by MCPL. This discussion focused primarily on WiscNet (internet transit) and Wausau Community Area Network (WCAN, network transport) memberships and services.

November 2021

K. Zimmermann met with L. Giordano and MCPL Team leads to discuss MCPL desires for improvements or changes to the Sierra Integrated Library System, WVLS ILS Administration Team, and opportunities to participate in V-Cat Consortium governance and decision-making processes. Following the meeting, K. Sullivan shared a document of ILS related improvement requests. Two of the improvement requests will be completed with the implementation of the Aspen Discovery catalog:

- Filter menu for searches in the public catalog
 - Improved sorting of search results with the most relevant results on top
- As a result of concerns raised by MCPL and other V-Cat libraries, the default search in Sierra was changed to a keyword search, which enables additional sorting of results and eliminating duplicate results. Additional concerns expressed will be taken into consideration during the ILS Evaluation and Review process.

K. Zimmermann met with L. Giordano and MCPL Branch Coordinators to discuss MCPL desires for improvement and concerns related to the Sierra Integrated Library System.

- **Expectation Complete:** MCPL will be invited to participate in WVLS sub-committees and work groups.

ACTIVITIES UPDATE

OCTOBER - DECEMBER 2022

A. Johnson is participating in the Northern Wisconsin ILS Consortium Exploration (NICE) Team. The purpose of NICE is to determine the value and feasibility of a merger between the Northern Waters Library Service (NWLS) and Wisconsin Valley Library Service (WVLS) Integrated Library System (ILS) implementations and respective ILS consortia. The NICE team will guide the overall exploration project, encourage library staff to participate in the exploration via surveys and focus groups, review survey results and focus group reports, and assist in developing a final recommendation report.

RESULTS FROM THIRD QUARTER 2022 REPORT JULY – SEPTEMBER 2022

August 2022

K. Zimmermann reached out to L. Giordano, A. Johnson, and K. Sabelko to collaborate on selection of staff to fill vacant positions on the V-Cat Cooperative Circulation and V-Cat Bibliographic / Interface Committees due to MCPL's recent staffing changes.

MCPL MEMBERSHIP ON WVLS BOARD-APPOINTED COMMITTEES

WVLS/V-Cat Steering Committee

Charge: A committee of six area public library directors, four WVLS board members and two WVLS staff, that advises on annual V-Cat budget appropriation and member library fees, and drafts changes to by-laws and other operational documents.

Member/s: MCPL Director L. Giordano.

WVLS Library Advisory Committee

Charge: A 15-member multitype group, with ten representatives from public libraries, and five representatives from school/academic/special libraries, that advises the WVLS Board on system budget and service priorities.

Member/s: MCPL Director L. Giordano. MCPL has a permanent seat on this committee. Meetings were held on April 5 and August 10.

WVLS V-Cat Council

Charge: Establishes standards and operational procedures for V-Cat libraries. It also approves the V-Cat Budget and V-Cat bylaw changes as recommended by the WVLS V-Cat Steering Committee with approval of the WVLS Board of Trustees.

Member/s: MCPL Circulation Services Lead/Library Specialist K. Roesler. The V-Cat Council includes one representative from each member library.

Any V-Cat representative may submit items for inclusion on meeting agendas. The V-Cat Council attempts to arrive at decisions by unanimous consent via voice vote. When unanimous consent cannot be reached, decisions will be made via a formal vote.

- For adoption of the order of agenda, adoption of the minutes of previous meetings, and adjournment, when unanimous consent cannot be reached, a simple majority of voting representatives will carry the vote.
- For all other actions, when unanimous consent cannot be reached, a two-thirds majority vote based on weighted representation AND a two-thirds majority of the representatives will carry the vote.

The V-Cat Council met on February 3, April 7, June 2, September 1, and November 10.

Others who attend V-Cat Council meetings include J. Kinney, M. Stachowiak, C. Luebbe, A. Johnson, O. Carlson, K. Sabelko.

V-Cat Bibliographic and Interface Committee

Charge: A group of staff representatives from WVLS and V-Cat libraries that are most actively involved in cataloging library materials, that reviews V-Cat cataloging practices as well as procedures related to bibliographic records, and how they display in the integrated library system and public library catalogs. This committee brings recommendations to the V-Cat Council for approval.

Member/s: C. Luebbe and J. Bauer. , P. Schmidt. Also in attendance: J. Kinney. J. Bauer became the new MCPL representative in September 2022.

ACTIVITIES UPDATE

OCTOBER – DECEMBER 2022

During its October 2022 meeting, the Committee discussed:

- Aspen Discovery Layer topics: larger print and Blu-Ray/DVD combo format display.
- A new name for “temporary” item records.
- New data included in the author field of bibliographic records.

RESULTS FROM THIRD QUARTER 2022 REPORT

JULY – SEPTEMBER 2022

During its July 2022 meeting, the Committee discussed:

- Aspen Discovery Layer topics: grouping records and forthcoming fiction lists.
- A solution for the French subject headings that OCLC has been adding to their bib records.
- A plan for updating bibliographic records with diacritical errors.

RESULTS FROM SECOND QUARTER 2022 REPORT

APRIL – JUNE 2022

During its May 2022 meeting, the Committee discussed:

- Aspen Discovery cataloging information: grouping records, cover images, audience, republication information, material types, and diacritics
- Overdrive records in Sierra: Because OverDrive records display to patrons in Aspen without them needing to be loaded into our Sierra database, it was decided that WVLS staff should remove OverDrive records from the Sierra database.
- OCLC is now adding French Language subject headings to its bib records. As these are records that are copied into the Sierra database, a process for removal of the French Language was discussed. A process to address this issue will be determined at future meetings.

RESULTS FROM FIRST QUARTER 2022 REPORT

JANUARY – MARCH 2022

Meetings were held in December 2021 and March 2022 to discuss:

- Z39.50 cataloging in system and strengthen the existing recommendation to include language about quality of records, necessary training, and WVLS’ ability to turn off the privilege if a library does not choose quality records.
- The need for volume information in magazine item records for proper functionality in the patron catalog and consistency in system.

- Aspen Discovery cataloging information: grouping records, cover images, audience, prepublication information, material types, and diacritics
- Reporting circulation of “other” materials for the annual report

V-Cat Cooperative Circulation Committee

Charge: With representation from each county in the WVLS / V-Cat service area, and WVLS staff, this committee is charged with reviewing V-Cat circulation practices and procedures related to resource sharing and patron records. This committee brings recommendations to the V-Cat Council for approval.

Member/s: M. Stachowiak, K. Roesler and O. Carlson. O. Carlson became the new MCPL representative in September 2022.

ACTIVITIES UPDATE

OCTOBER – DECEMBER 2022

The Committee met in August and October to discuss:

- Reducing the available number of statuses for item records.
- Survey results regarding converting juvenile patrons to adult patrons and handling fines on juvenile patron accounts.
- Library card application standards and recommended application form for all V-Cat libraries.
- Processing fees and streamlining loan rules for all V-Cat libraries.
- Automatic OverDrive patron record merging
- Loan rules for high demand juvenile items
- Create list templates and saved queries.
- Print and email circulation notice templates

The committee will meet again on Friday, December 9.

RESULTS FROM THIRD QUARTER 2022 REPORT

JULY – SEPTEMBER 2022

The Committee met in June and July to discuss:

- Instructions for creating new patron records and definitions for patron record fields.
- Library card application standards for all V-Cat libraries.
- Policies and processes in place for converting juvenile patrons to adult patrons and handling fines on juvenile patron accounts.
- Steps needed to provide templates for the most used/basic searches and reports.
- Streamlining and standardization of how libraries use item status.
- Setting up automatic Overdrive merging of patron records when a new barcode number is assigned.

RESULTS FROM SECOND QUARTER 2022 REPORT

APRIL – MAY 2022

The May 2022 meeting featured discussions on 2022 projects, including library card application and patron record standardization, processing fees, juvenile to adult card conversions, high demand materials practices and item statuses.

RESULTS FROM FIRST QUARTER 2022 REPORT

JANUARY – MARCH 2022

During its March 2022 meeting, the Committee discussed Circulation functionality requirements for the ILS Evaluation and review.

V-Cat ILS Evaluation and Review Committee

Charge: Created by the V-Cat Council in February 2022, this 10-member committee of colleagues from V-Cat member libraries and members of the WVLS staff is charged with reviewing available Integrated Library Systems / Library Service Platforms and their viability for the V-Cat Consortium. Ultimately the committee will be expected to present a recommendation to V-Cat to either re-negotiate the current contract with Innovative or negotiate a new service contract with another vendor.

Member/s: A. Johnson (Committee Chair) and C. Luebbe.

ACTIVITIES UPDATE

OCTOBER - DECEMBER 2022

During meetings in September and October, the committee set the format and schedule for ILS Demonstrations. Demonstrations will take place over two consecutive days and be broken out into modules. Demonstrations will be recorded to allow as many staff as possible to review the presentations. All attendees will be invited to complete a post demonstration survey to provide feedback about the products. The committee discussed questions and format for initial survey, Survey 1, and decided on the following evaluation process:

- November – December 2022: Demonstrations followed by Attendee Survey 1
- December 8: Committee meets to develop Survey 2
- November 2022 – January 2023: Committee reviews Survey 1 results
- January – February 2023: Committee meets to discuss demonstrations and Survey 1, and complete Post Results Survey 2 to rate/rank products
- February – March 2023: Committee reviews Post Results Survey 2
- March 2023: Committee meets to discuss Survey 2 results and selects vendors for site visits
- April: Committee site visits
- Committee presents final recommendation to the V-Cat Council and WVLS Board of Trustees

Koha and Carl demonstrations are complete, and recordings have been provided. Sierra demonstrations are scheduled for December 14 and 15.

RESULTS FROM THIRD QUARTER 2022 REPORT

JULY – SEPTEMBER 2022

During the September 8 meeting, the Committee selected the following vendors to invite for demonstrations and further consideration: The Library Corporation's Carl, Koha supported by Bywater Solutions, and Innovative's Sierra.

Demonstrations will be scheduled by the end of 2022. Library staff will be invited to attend demonstrations, or view recordings, and provide feedback. The Committee also began to define rating tools to further evaluate the products.

During meetings in June, July, and August, the committee reviewed RFI responses from five vendors to narrow the list of possible products and select vendors to invite for demonstrations.

RFI responses included information about collaboration with NWLS. Northern Waters Library Service ILS staff and the NWLS ILS Exploration Workgroup Chair have been invited to attend ILS Evaluation and Review Committee meetings.

RESULTS FROM SECOND QUARTER 2022 REPORT

APRIL – JUNE 2022

During meetings in April, May and June, the ILS Evaluation and Review Committee completed the RFI. Following the June meeting, the RFI was sent to six potential vendors. The Committee is developing a scoring matrix to evaluate products.

RESULTS FROM FIRST QUARTER 2022 REPORT

JANUARY – MARCH 2022

During its first meeting on March 10, a timeline and process for ILS Evaluation and Review was developed, and work began on drafting a Request for Information (RFI) to be sent out to potential vendors.

- **Expectation Complete: A representative from WVLS will attend MCPL board meetings on a quarterly basis and give updates on expectations progress.**

ACTIVITIES UPDATE

OCTOBER – DECEMBER 2022

December 19, 2022 MCPL Board of Trustees Meeting

WVLS will share its final report on the expectations outlined in the WVLS Expectations Assessment worksheet, and provide a brief presentation on the WVLS Fiscal Report (see Appendix E).

November 21, 2022 MCPL Board of Trustees Meeting

WVLS prepared an interim summary of the 45-page July – September 2022 third quarter WVLS Expectations & Assessments Report that WVLS shared with the MCPL on September 19 and solicited comments and questions.

RESULTS FROM THIRD QUARTER 2022 REPORT

AUGUST – SEPTEMBER 2022

September 19, 2022 MCPL Board of Trustees Meeting

WVLS attended this meeting to report its progress on the expectations outlined in the WVLS Expectations Assessment worksheet and provided a brief presentation on the WVLS Continuing Education and Training Program.

RESULTS FROM SECOND QUARTER 2022 REPORT

RESULTS FROM MARCH – JULY 2022

July 18, 2022 MCPL Board of Trustees Meeting

WVLS attended this meeting to report its progress on the expectations outlined in the WVLS Expectations Assessment worksheet and provided a brief presentation on the WVLS Summer Library Performer Grant, Beanstack, and virtual and in-person meetings of youth services staff hosted by library services consultants from WVLS and IFLS Library System.

RESULTS FROM FIRST QUARTER 2022 REPORT

JANUARY – MARCH 2022

March 21, 2022 MCPL Board of Trustees Meeting

WVLS attended this meeting to report its progress on the expectations outlined in the WVLS Expectations Assessment worksheet, and to provide a demonstration on the new Aspen Discovery online catalog made available to Marathon County library users in early March.

- **Expectation Complete:** WVLS will help MCPL create an “onboarding” in-person/virtual training for new MCPL Board Members.

RESULTS FROM THIRD QUARTER 2022 REPORT

JULY – SEPTEMBER 2022

In August J. Matczak, with assistance from WVLS staff, created the video “Introduction to WVLS.” In this video, viewers learn:

- How public library systems started
- The purpose of public library systems
- How public library systems are governed
- The unique history between Marathon County and WVLS
- Service highlights of WVLS to its member libraries

The video is just under 7 minutes in length and can be found at <https://www.wvls.org/about-wvls/>.

RESULTS FROM SECOND QUARTER 2022 REPORT

APRIL – JUNE 2022

In April, M. Sepnafski and J. Matczak met with L. Giordano to review expectations for this goal. L. Giordano suggested that a helpful tool to share with new MCPL Board members and staff would be a *Digital Byte* (WVLS digital training video) on WVLS, its operation, and how it supports member libraries. An outline for the training video was developed in May.

- **WVLS will work with our Adult Services Librarian to come up with a viable plan for MCPL to digitize their Wisconsin collection and assist with any relevant grants needed (Project ION).**

ACTIVITIES UPDATE

OCTOBER – DECEMBER 2022

November 2022

On November 28, A. Hamland and J. Kinney discussed copyright statements for interviewees and interviewing organizations use during oral history interviews. MCPL is also looking into an Oral History Metadata Synchronizer for adding timestamps to oral history video and transcripts while LEAN WI evaluates Content DM as an option for digitization, metadata generation, and access software.

October 2022

On October 19, A. Hamland and J. Kinney discussed content for the MCPL oral histories digitization project. The email exchange focused on privacy protocol for persons mentioned during an oral history interview, representation of formerly incorporated towns, and transcription services to transcribe the group of interviews that do not have transcriptions.

September 2022

Central Wisconsin Digital Project (CWDP) archives were made available on the WVLS Aspen site. J. Kinney was invited to provide feedback about how collections, including MCPL's digitized yearbooks, are displayed. Adjustments will be made once WVLS receives feedback from MCPL and the T. B. Scott library, who have added most of the content to the CWDP archive. Once adjustments are complete the archive will be made available on the MCPL Aspen site.

K. Zimmermann began working with J. Kinney to convert the current MCPL index to the Wausau Daily Herald to a format compatible with Aspen so that indexes can be sideloaded into the Aspen genealogy and obituaries interface. This will make the archive much more accessible to MCPL patrons.

RESULTS FROM THIRD QUARTER 2022 REPORT

JULY – SEPTEMBER 2022

September 2022

On September 7, J. Kinney notified WVLS that she was awarded a \$1,000 grant from WiLS to support work on one of MCPL's digitization projects.

Aspen Genealogy and Local History training requested by MCPL staff is scheduled for Wednesday, September 28. Attendees will learn how to use Aspen's built-in genealogy records tool to record and share obituaries and other genealogical information. Attendees will also learn how to increase discovery of local archives by adding digital copies of local history materials into Aspen or linking out to local history archives.

July 2022

Conversations between A. Hamland and J. Kinney focused on narrative writing for a National Endowment for the Humanities (NEH) grant and others. J. Kinney completed the WiLS Ideas to Action Grant process with award notifications expected in late August or early September. J. Kinney and A. Hamland will use feedback on WiLS application to fine tune MCPL Oral History Digitization project narrative for future grant opportunities.

RESULTS FROM SECOND QUARTER 2022 REPORT

APRIL - JUNE 2022

On June 29, A. Hamland met with J. Kinney to discuss progress made on MCPL digitization projects and grant opportunities for each project. MCPL has hired a part-time librarian who is assisting in the project. J. Kinney is working through applications for digitization volunteers in preparation for the fall. The next digitization meeting date is set for July 20.

On May 18 and June 8, A. Hamland and K. Zimmermann connected with J. Kinney to discuss the development on MCPL's digitization projects, explored solutions to access, connections to partner organizations and libraries and grant opportunities.

K. Zimmermann discussed opportunities for integrating local history materials into the Aspen Discovery Catalog with J. Kinney and B. Kromholz. Options for training sessions and mentoring relationships with other Aspen Libraries that have integrated digitized materials into their Aspen Discovery catalogs are being investigated.

April 2022

J. Kinney consulted with A. Hamland on April 19 regarding MCPL digitization projects, copyright issues, and grant opportunities.

- **WVLS will increase communication about the IDEA team (<https://nwls.wislib.org/join-the-idea-team/>) and what the team is currently working on to help reach our goal of a more inclusive library environment.**

ACTIVITIES UPDATE

OCTOBER – DECEMBER 2022

NWLS and WVLS Inclusive Services Consultant S. Machones will provide an inclusive services orientation for MCPL staff on December 9.

S. Machones shared an *Inclusive Services Update* with each system's member libraries each month in the last quarter of 2022.

The October *Update* highlighted 2022 WLA Annual Conference sessions planned on inclusive topics and on the W.J. Niederkorn Library's newly launched accessibility app for its Port Washington area patrons. Several links to continuing education were shared as well as links to stories about misconceptions regarding deafness, libraries helping water crises, and successful multilingual storytimes.

The November *Update* featured resources and dialogue about Native American Heritage Month, the Wisconsin Historical Society's traveling kits and the new WVLS *Digital Byte* on the Justice Gap. Continuing education opportunities including several in-depth classes were also shared.

The December *Update* reminded readers to consider how to make their services and spaces inclusive and accessible during this holiday season for those who might not celebrate holidays or birthdays. It also shared Summer Library Program inclusion resources; considerations for the ways we talk about and teach Native American heritage and Native American history, present and future; reminders on upcoming inclusive services webinars and classes from UW-Madison's iSchool; and a listing of diverse holidays in December.

Links to "Inclusive Services Updates" are shared in *WVLS Monday Mentions* the first week of the month.

RESULTS FROM THIRD QUARTER 2022 REPORT JULY – SEPTEMBER 2022

Links to the August and September "Inclusive Services Updates" were shared in *WVLS Monday Mentions* during the first week of those months. *Monday Mentions* is a weekly email from WVLS that alerts member colleagues to regional- and state-level news and service announcements for the week.

On September 8, S. Machones reached out to L. Giordano to enquire about how best to provide an Inclusive Services Orientation for her and/or her staff.

RESULTS FROM SECOND QUARTER 2022 REPORT APRIL – JUNE 2022

Public library directors in Northern Waters Library Service and Wisconsin Valley Library Service are emailed a monthly *Inclusive Services Update* from Inclusive Services Consultant for WVLS and Northern Waters Library Service, Sherry Machones. The update shares activities of the IDEA Team, and highlights continuing education opportunities, topical news stories, lists of holidays and resources related to inclusion, diversity, equity, and accessibility.

Beginning in June, *WVLS Monday Mentions*, a weekly email that alerts WVLS members to news and service announcements for the week, will promote this publication as well.

Improved integrated library system (ILS) functionality

- **Expectation Complete: Improved record subject headings.**

ACTIVITIES UPDATE

OCTOBER - DECEMBER 2022

Monthly queries have occurred in the Sierra database during September, October, and November to search for records without subject headings. Only a handful of such records were discovered each month. Catalogers that brought in those records have been alerted, additional training and support was offered, and records have been updated with correct subject headings.

RESULTS FROM THIRD QUARTER 2022 REPORT

JULY – SEPTEMBER 2022

During the July 18, 2022 MCPL Board of Trustees meeting, WVLS was asked what steps were being taken to monitor and address bibliographic records identified without subject headings. The response to this question is shared in this report as Appendix C.

RESULTS FROM SECOND QUARTER 2022 REPORT

APRIL – JUNE 2022

In 2020, there were 14,302 bibliographic records identified without subject headings in the V-Cat database.

Number of records without subject headings in 2020	14,302
Number of records cleaned up by libraries	8,964
Number of records sent for outsourcing	5,338
Number of records received from outsourcing with a “perfect” match and have been upload to V-Cat	4,539
Number of records with an “acceptable” match that were reviewed before uploading to V-Cat	561
Number of records with no matches	238
Number of records that need local headings added	70

R. Metzler met frequently with WVLS member library catalogers to provide guidance on how to improve these records. Once library staff completed their individual library lists, WVLS sent the remaining records to Backstage Library Works, a vendor that assists WVLS with updating bibliographic records in the V-Cat catalog. Bibliographic records received from Backstage with perfect matches were uploaded into the V-Cat database. A file of acceptable matches was also sent from Backstage. R. Metzler reviewed this file, edited when necessary, and then uploaded it into the V-Cat database. The remaining 308 records were reviewed by R. Metzler and M. Pregler, a WVLS cataloging partner from Antigo Public Library. This project was completed in early June 2022.

- **Expectation Complete: More user-friendly interface for the public.**

Aspen Discovery Product

ACTIVITIES UPDATE

OCTOBER - DECEMBER 2022

November 2022

Aspen Discovery maintenance and improvements are ongoing. On November 2 the V-Cat Classic catalog URL was changed to point to the WVLS Aspen IP address.

October 2022

On October 27, K. Zimmermann met with K. Sullivan to work on configuring the Aspen purchase suggestion interface for MCPL. K. Sullivan is planning to transition to the new workflow in January 2023. On October 20, K. Zimmermann met with J. Johnson and A. Hetzel to review features of Sierra and Aspen beneficial for service to Homebound patrons. As a result of this meeting the Sierra Homebound reports feature was enabled for MCPL.

September 2022

Archives from the Central Wisconsin Digitization project are now linked in the WVLS Aspen site and will be added to the MCPL Aspen site once adjustments are made based on MCPL and T. B. Scott library preferences.

RESULTS FROM THE THIRD QUARTER 2022 REPORT

JULY – SEPTEMBER 2022

August 2022

An Aspen Record Grouping work group is making record changes to combine multiple formats of titles into the same Aspen record. J. Kinney and T. Hornbeak and staff from Antigo, Loyal, Minocqua, and Rhinelander have volunteered to assist. An Aspen Forthcoming Fiction work group is curating monthly lists of upcoming titles. J. Johnson and staff from Antigo and Rhinelander have volunteered to assist.

July 2022

EBSCOhost integration was completed to provide access to articles and databases within Aspen. An instructional video is available for library staff.

RESULTS FROM SECOND QUARTER 2022 REPORT

APRIL - JUNE 2022

Library staff are now able to submit cover images to WVLS to be uploaded in the case that an image is missing or incorrect. Instructions have been developed with copyright law and fair use guidelines in mind and were shared at the June V-Cat Council meeting.

Zimmermann had multiple telephone and email conversations with B. Krombholz, J. Kinney and other MCPL staff to improve Aspen Discovery record display, user experience, and website indexing.

On April 14, K. Zimmermann shared a modification for the public catalog computers in the MCPL Wausau children's department to automatically default to the children's browse categories.

RESULTS FROM FIRST QUARTER 2022

NOVEMBER 2021 – MARCH 2022

K. Zimmermann led efforts to implement a new Aspen Discovery library catalog interface for each V-Cat Consortium member library. MCPL's Aspen Discovery catalog was made available to its users the week of March 14, 2022. MCPL now has its own custom-tailored catalog site to highlight new materials and special collections while still allowing library users to access the wide variety of materials available throughout the V-Cat Consortium.

K. Zimmermann worked with B. Krombholz to configure new discovery layer to work with MCPL's website to create a seamless transition with maximum functionality. During that same period, the WVLS Aspen Implementation Team worked with the MCPL Library Services Team to ensure the new Aspen Discovery library catalog would be configured to MCPL's expectations to best serve Marathon County library users.

- **Biennial review of new ILS products.**

ACTIVITIES UPDATE

OCTOBER - DECEMBER 2022

Product demonstrations scheduled for November and December 2022 include:

- Innovative's Sierra - Wednesday, December 14 – Thursday, December 15
- TLC's Carl - Tuesday, November 29 – Wednesday, November 30
- Koha supported by Bywater Solutions Wednesday, November 16 – Thursday, November 17

Demonstrations will be broken out into modules and will be recorded to allow as many staff as possible to attend. All attendees will be invited to complete a post demonstration survey to provide feedback about the products.

The committee discussed the survey questions and format. The V-Cat ILS Evaluation and Review Committee plans on the following process for evaluating and recommending products:

- November – December 2022: Demonstrations followed by Attendee Survey 1
- December 8: Committee meets to develop Survey 2
- November 2022 – January 2023: Committee reviews Survey 1 results
- January – February 2023: Committee meets to discuss demonstrations and Survey 1, and complete Post Results Survey 2 to rate/rank products

- February – March 2023: Committee reviews Post Results Survey 2
- March 2023: Committee meets to discuss Survey 2 results and selects vendors for site visits
- April: Committee site visits
- Committee presents final recommendation to the V-Cat Council and WVLS Board of Trustees

RESULTS FROM THIRD QUARTER 2022 REPORT

JULY - SEPTEMBER 2022

During the September 8 meeting, the V-Cat ILS Evaluation and Review Committee selected the following vendors to invite for demonstrations and further consideration: The Library Corporation's Carl, Koha supported by Bywater Solutions, and Innovative's Sierra.

Demonstrations will be scheduled by the end of 2022. Library staff will be invited to attend demonstrations, or view recordings, and provide feedback. The Committee also began to define rating tools to further evaluate the products.

During meetings in June, July, and August, the committee reviewed RFI responses from five vendors to narrow the list of possible products and select vendors to invite for demonstrations.

RFI responses included information about collaboration with NWLS. Northern Waters Library Service ILS staff and the NWLS ILS Exploration Workgroup Chair have been invited to attend ILS Evaluation and Review Committee meetings.

The Committee's tentative timeline is to provide a recommendation to the V- Cat Council in the third quarter of 2023 with a final decision in the fourth quarter of 2023 and a potential migration to a new product in the second quarter of 2024.

RESULTS FROM SECOND QUARTER 2022 REPORT

APRIL - JUNE 2022

The ILS Evaluation and Review Committee met in April, May, and June to complete a Request for Information (RFI) document to send to ILS vendors. On June 3, 2022 the RFI document was submitted to 6 vendors, including Innovative Interfaces, Inc. for its Sierra product, the vendor currently used by the V-Cat Consortium. The Committee is developing a scoring matrix to evaluate products.

RESULTS FROM FIRST QUARTER 2022 REPORT

JANUARY - MARCH 2022

The V-Cat Council created an ILS Evaluation and Review Committee charged with reviewing available Integrated Library Systems / Library Service Platforms and their viability for the V-Cat Consortium. The committee will ultimately be expected to present a recommendation to the V-Cat Council, either to re-negotiate the current contract with Innovative or to negotiate a new service contract with another vendor.

As part of its charge, the Committee began drafting an RFP to send to select Integrated Library System vendors.

- **Expectation Complete:** Work with ILS product developers to fix the issue of missing cover images in the catalog.

RESULTS FROM SECOND QUARTER 2022 REPORT

APRIL – JUNE 2022

The new Aspen Discovery Catalog pulls in cover images from multiple sources and greatly improves cover image availability for non-book formats. However, cover images are not available for all items. As part of its investigation on the legalities of uploading cover images from other areas in April and May, WVLS met with Dr. Tomas Lipinski, professor, librarian, lawyer, and author of several works on the topic of libraries and copyright. He advised WVLS that uploading our own cover images into Aspen for display in the catalog would be within Fair Use. With assistance from MCPL staff, WVLS was able to upload generic cover images of MCPL artwork into the library's new Aspen library catalog.

A process to submit images was shared with the V-Cat Council on June 2.

- **Expectation Complete:** Create weighted voting system to accurately represent our service population.

ACTIVITIES UPDATE

OCTOBER – DECEMBER 2022

At its meeting in November, the V-Cat Council received the weighted vote calculations for 2023.

RESULTS FROM FIRST QUARTER 2022 REPORT

JANUARY – MARCH 2022

In 2021, the WVLS Board of Trustees passed V-Cat By-laws changes, reviewed in 2020 by the V-Cat Steering Committee, to institute a dual voting model including both representative voting and weighted voting. The weighted vote is calculated based on collection size, circulation transactions, and net lending to other libraries. In 2022, MCPL's weighted vote is 34 out of 110 votes, and representative vote is 1 out of 25 votes.

Additional support for improved integrated library system (ILS) functionality

Examples of Support Provided

ACTIVITIES UPDATE

OCTOBER – DECEMBER 2022

November 2022

K. Zimmermann provided historical ILS data for invoices and values to S. Martell for Marathon County's Internal Control questionnaire. K. Zimmermann worked with J. Bauer and C. Luebbe to set up individual logins for cataloging and acquisitions activities.

October 2022

The [Joint ILS Consortium Exploration Project](#) collaboration between the Northern Waters Library System and WVLS began. WiLS was selected as a consultant to assist with the process, an exploration team has been formed and met for the first time on October 25. The project has been named [Northern Wisconsin ILS Consortium Evaluation \(NICE\)](#). MCPL will be intimately involved in the process as A. Johnson is a member of the NICE Team.

In October K. Zimmermann submitted a Sierra ILS development request to Innovative to improve the functionality of patron blocks based on item types. The improvement was requested because of a functionality request from MCPL staff. The request has progressed through multiple review phases and is now considered a future possibility for software development.

RESULTS FROM THIRD QUARTER 2022 REPORT

JULY - SEPTEMBER 2022

LSTA Grant applications have been pre-approved to fund two projects.

A [Cooperative Cataloging Exploration Project](#) submitted by the Northern Waters Library System, will use grant funds to develop a report on cataloging practices and opportunities for statewide standardization of records. Seven library systems are participating in the grant.

Preliminary outcomes for the Cooperative Cataloging Exploration Project include the following:

- Compile what cataloging practices we already have in common.
- Develop best practices in our systems for system cooperative cataloging, and any best practices for centralized cataloging.
- Develop best cataloging practices and standards, perhaps with a very basic/base level that includes what we are already all doing, secondary levels, and aspirational goals.
- Compile suggestions from discovery layer vendors on what they might need from record data.

A [Joint ILS Consortium Exploration Project](#) collaboration between the Northern Waters Library System and WVLS will use grant funds to determine value and feasibility of merging two integrated library systems and respective ILS consortia. The overarching goals of a joint ILS consortium are to provide increased ILS administrative support to member libraries and improved service to library users.

Preliminary outcomes for the Joint ILS Consortium Exploration Project include:

- Identify concerns, barriers, and benefits of a merged ILS and consortia.
- Identify conditions that make a merged system desirable
- Design policies and governance structure
- Determine joint consortium overall budget and calculation method for membership shares
- Create potential timeline for migration including an implementation plan, logistics, and steps needed for a unified ILS

In August K. Zimmermann worked with H. Wilde and A. Johnson to begin rolling out individual username and password credentials for Sierra access to increase security.

On July 25, K. Zimmermann offered to meet with A. Johnson to discuss setting up MCPL circulation notices to be automatically sent out to library patrons instead of being sent manually by MCPL staff.

On July 22, K. Zimmermann invited A. Johnson to select an MCPL staff member to attend Sierra Technical Services Training hosted by Innovative along with a WVLS staff person in October. This will help MCPL with training new staff on the MCPL Technical Services Team.

In June and July K. Zimmermann and J. Klingbeil worked with MCPL to offer multiple workaround options when Baker and Taylor's usual file transfer protocol (FTP) service failed multiple times. FTP is an essential acquisitions process that is necessary for MCPL to order new materials from Baker and Taylor, as well as receive and process related invoices.

RESULTS FROM SECOND QUARTER 2022 REPORT

APRIL - JUNE 2022

June 2022

On June 17, a change in Baker & Taylor's servers behind their ordering service disrupted ordering functionality for many customers. J. Klingbeil and K. Zimmermann worked with MCPL staff and vendor support from Baker & Taylor and Innovative to identify the root cause of Baker & Taylor service level issues preventing successful ordering from the Sierra Acquisitions module. It was determined that Baker & Taylor's new server was misconfigured (affecting customers globally). Innovative was able to adjust a configuration setting on our "customer" side as a temporary solution, which worked for MCPL's case since Baker & Taylor is the only service provider MCPL currently connects to via this mechanism. Soon after, Baker & Taylor resolved the root issue on their side.

On June 8, K. Zimmermann met with S. Martell to discuss ILS fine payment reporting.

May 2022

D. Hahn consulted with K. Zimmermann regarding Sierra and printing at MCPL branches. With information Zimmermann shared in March and in May, D. Hahn was able to successfully resolve printing issues. K. Zimmermann followed up with M. Stachowiak regarding Sierra invoicing and acquisitions and met with H. Wilde to review ILS reports and statistics regularly gathered by MCPL and WVLS.

April – May 2022

K. Zimmermann had multiple telephone and email conversations with B. Krombholz, J. Kinney and other MCPL staff to improve Aspen Discovery record display, user experience, and website indexing.

K. Zimmermann had several meetings and conversations with A. Johnson, MCPL IT Technician D. Hahn and MCPL Mosinee Branch Coordinator S. Moscatello to roll out Sierra Web Application access as an alternative to Sierra Offline Circulation. MCPL branches experiencing high latency with network connectivity are occasionally unable to access Sierra Desktop Application. The addition of Sierra Web Application for these branch locations allows branch staff to offer more services to patrons than Sierra Offline Circulation, including the ability to create new patron records, edit patron records, take fine payments and check in items.

RESULTS FROM FIRST QUARTER 2022 REPORT

DECEMBER 2021 - MARCH 2022

Following a conversation with D. Hahn addressing shared concerns with MCPL's current suite of self-check, sorting machine, and RFID products, WVLS offered to support MCPL in determining ILS compatibility with alternative self-check, sorting machine, and RFID vendors.

In January, WVLS shared information with D. Hahn to support MCPL branch libraries with printing paging lists from Sierra.

In December 2021 and January 2022, WVLS worked with MCPL Library Business Specialist H. Wilde and K. Roesler to ensure that WVLS and MCPL practices for gathering patron record statistics gathering is accurate and consistent.

WVLS worked with K. Roesler, L. Wood and K. Sullivan to add the 'Merge Patrons' function to MCPL's Sierra logins, and to develop a training document outlining the use of the function.

WVLS helped K. Roesler, L. Wood and D. Hahn to install Sierra Offline Circulation on MCPL workstations and to train staff to use the product during network interruptions. This feature enables libraries to efficiently check out materials to patrons when they are unable to access the usual Sierra Desktop Application. Branch libraries received assistance in testing the Sierra Offline Circulation product and using it during one outage in January and another in February.

MCPL received WVLS troubleshooting and support following an unusually high number of dropped email notifications to patrons.

Collaborative collection development to encourage a timely, broad, and extensive collection

- **Expectation Complete:** Continue annual grant to provide MCPL with additional funding for physical holdings to broaden the scope of the fiction and nonfiction collections.

RESULTS FROM FIRST QUARTER 2022 REPORT

JANUARY – MARCH 2022

The WVLS Board of Trustees approved a \$10,000 collection development grant to MCPL to enhance its specialized collections. The grant was given to MCPL in March 2022. MCPL has been the recipient of this grant from WVLS since 2015.

- **Increase communication between member libraries to collaborate on collection development in order to work towards a less repetitive catalog and work together to provide complementary collections.**

ACTIVITIES UPDATE

OCTOBER – DECEMBER 2022

December 2022

WVLS prepared a collection inventory / review list of the oldest and least used titles at each V-Cat library for use as a weeding advisory tool.

September 2022

WVLS hosted a V-Cat Collection Development Meet Up on Thursday, September 29. The group reviewed the results of the V-Cat Collection Development Practices Survey, and shared resources for selecting new materials and weeding materials. Notes and slides were shared with all V-Cat staff participating in collection development.

The group identified a number of possible projects for collection development collaborations and identified the following as high priority:

- Participants were encouraged to connect with other library staff working on collection development via an email group established by WVLS.
- Developing a list of staff at V-Cat libraries that are willing to serve as subject experts to recommend titles or answer questions. WVLS created a shared document for this purpose.
- A collection inventory / review list of the oldest and least used titles at each V-Cat libraries for use as a weeding advisory tool.
- Sierra Decision Center reports training

The group plans to meet again in late February or early March 2023.

RESULTS FROM THIRD QUARTER 2022 REPORT JULY – SEPTEMBER 2022

A WVLS Collection Development meeting, slated for Thursday, September 29, WVLS will present the results of the V-Cat Collection Development Survey. Attendees will talk about opportunities for collaboration and how WVLS can support member libraries' collection development processes.

RESULTS FROM SECOND QUARTER 2022 REPORT APRIL – JUNE 2022

In May, WVLS created a collection development email listserv to increase communication among member library staff involved in collection development. In addition, K. Zimmermann conducted a survey of library staff involved in collection development to determine needs for collection development support and opportunities for collaboration.

- **Help libraries collaborate to create services and collections that respond to needs of underserved populations.**

RESULTS FROM THIRD QUARTER 2022 REPORT JULY – SEPTEMBER 2022

An email was sent in September sharing the WPLC Collection Development Committee's Diverse Collection Toolkit to the WPLC WVLS Advantage selectors. This toolkit provides useful tips and information for selecting titles that are representative of all readers and users in Wisconsin.

Through frequent communications with colleagues, WVLS provides resources for libraries to consult as they work to build, maintain, diversify, and evaluate their library collections. Resources developed and shared includes Starred Reviews Monthly Digest, material concerns and challenge articles and resources, topic areas in the V-Cat online catalog, as well as professional journals, reviews, blogs, and websites. WVLS also offers online and in-person opportunities for librarians to discuss specific items and collections as a whole, and to share their collection development expertise and offer support.

RESULTS FROM FIRST QUARTER 2022 REPORT JANUARY – MARCH 2022

A. Hamland and T. Weinfurter discussed the creation of curated book and materials lists for Hmong, Afghani, and Spanish speakers as well as a parent resource feature for the MCPL website and for library users in need. Project is ongoing.

- **Assist in the weeding of outdated materials at member libraries to maintain a healthy collection across the system and to prevent outdated and superseded materials from overloading the catalog and confusing patrons.**

ACTIVITIES UPDATE

OCTOBER – DECEMBER 2022

On October 19, J. Matczak sent an email to the WVLS Director's listserv announcing a webinar called "It's a Nice Day for a Light Weeding," presented by the Southwest Wisconsin Library System. **The webinar covered creating, implementing, and maintaining a weeding plan that works for all libraires.**

RESULTS FROM THIRD QUARTER 2022 REPORT

JULY – SEPTEMBER 2022

In September, libraries with magazines older than 5 years were contacted and encouraged to inventory those holdings. Library staff have been encouraged to weed those titles if no longer on the shelf or no longer relevant.

In July, the WVLS *Monday Mentions* announced a webinar opportunity on the topic of weeding outdated materials. Hosted by OCLC, a global library organization that provides shared technology services, original research, and community programs for its membership and the library community at large, the webinar "Weed 'Em and Reap: Getting Your Collection from Awful to Awesome" was held on July 14.

RESULTS FROM SECOND QUARTER 2022 REPORT

APRIL – JUNE 2022

In May, WVLS created a collection development email listserv to increase communication among member library staff involved in collection development. In addition, K. Zimmermann conducted a survey of library staff involved in collection development to gather information on weeding practices and gauge needs for weeding support.

RESULTS FROM FIRST QUARTER 2022 REPORT

JANUARY – MARCH 2022

WVLS offers training to libraries to create their own lists of materials to consider for weeding. Lists are also provided to libraries upon request. To date, one list has been requested in 2022.

Additionally, WVLS assists libraries with completing an inventory of their collections. To date, one library has requested assistance.

During the bibliographic records without subject headings project (update provided above), many libraries used their list of bibliographic records to do an inventory and to weed collections. This project assisted library staff in finding missing items that were still in the V-Cat database as well as outdated or damaged items.

- **Work with MCPL to find a solution for preserving our community's paper of record, the Wausau Daily Herald.**

ACTIVITIES UPDATE

Digitization projects are unique to each community, depending on the nature of each project, and format of items to be digitized. WVLS consultants assist member libraries in developing a plan for each digitization project, as well as identifying grant opportunities suited for project needs, grantor eligibility factors, and grant timelines.

OCTOBER - DECEMBER 2022

On October 24, A Hamland emailed J. Kinney regarding the ALA Carnegie – Whitney Grants (deadline November 4, 2022, awarded annually) and the NEH National Digital Newspaper Program (deadline January 12, 2023).

RESULTS FROM THIRD QUARTER 2022 REPORT

JULY – SEPTEMBER 2022

On September 7, J. Kinney notified WVLS that she was awarded a \$1,000 grant from WiLS to support work on one of MCPL's digitization projects.

A. Hamland and J. Kinney continued conversations regarding narrative writing for the National Endowment for the Humanities (NEH) National Digital Newspaper Program (NDNP) and other grant opportunities. J. Kinney completed the WiLS Ideas to Action Grant process with award notifications expected in late August or early September.

J. Kinney and A. Hamland will use feedback on WiLS application to fine tune the MCPL Wausau Daily Herald Digitization Project narrative for the NDNP grant deadline of January 12, 2023.

RESULTS FROM SECOND QUARTER 2022 REPORT

APRIL - JUNE 2022

J. Kinney consulted with A. Hamland and K. Zimmermann on April 19, May 18, and June 8 to discuss the development on MCPL's digitization projects, explored solutions to access, connections partner organizations and libraries, and finally grant opportunities. The Wausau area yearbooks project likely will require fewer decisions regarding digitization, metadata, copyright, and platform than the digitization of oral histories, Wausau Daily Herald, and genealogical materials.

Increased continuing education & professional development geared for larger libraries

- **Expectation Complete:** WVLS should survey MCPL staff on continuing education needs and desires.

ACTIVITIES UPDATE

SEPTEMBER – DECEMBER 2022

The October 10 and October 17 issues of *Monday Mentions* communicated the opportunity for MCPL staff to participate in a statewide professional development survey that will help shape continuing education offerings in the region and state in 2023-24. Results of the survey will be made available in January 2023.

RESULTS FROM SECOND QUARTER 2022 REPORT

APRIL – JUNE 2022

During the March 21, 2022 MCPL Board of Trustees meeting, WVLS was asked to share the results of the continuing education and training survey sent to member libraries in January 2022. The survey results are shared at the end of this report as Exhibit A.

Survey results were used to develop topics for a Spring 2022 Webinar series and will be used to drive upcoming workshop and training opportunities. Continuing education webinars are offered by WVLS in collaboration with the IFLS Library System, Northern Waters Library Service, and Southwest Wisconsin Library System.

RESULTS FROM FIRST QUARTER 2022 REPORT

JANUARY – MARCH 2022

To identify area libraries' continuing education and training needs, public library directors were asked to complete a survey sent to them on January 31, 2022. On February 1, L. Giordano and H. Wilde were asked to forward the survey to MCPL staff for their feedback.

- **WVLS will host an annual in-service day for MCPL staff covering continuing education programming that is relevant to MCPL staff members with specialized knowledge and roles.**

ACTIVITIES UPDATE

OCTOBER – DECEMBER 2022

On Friday, September 16, over 40 Marathon County Public Library employees participated in an all-staff in-service day, coordinated by J. Matczak. MCPL locations were closed to the public so that employees could attend the event, which consisted of a morning presentation on safety and security, followed by role playing. Meditation in the afternoon was led by WVLS Board of Trustee **Mandy Wright**. The events of the day were well received.

RESULTS FROM THIRD QUARTER 2022 REPORT

JULY – SEPTEMBER 2022

On July 11, 2022, J. Matczak presented an in-service day schedule to L. Giordano, which included an agenda, speaker description, and registration link. The in-service day is scheduled for Friday, September 16. J. Matczak will arrange speaker needs with S. Albrecht and M. Wright, manage refreshments, order lunch, and coordinate the room set up. MCPL staff started registering for the in-service day on August 25, 2022.

AGENDA

8 - 8:30 am	Refreshments and Conversation
8:30 am	Introduction and Housekeeping
8:35 am – 12:00 pm	The Challenging Patron Workshop: Library Security, Safety, and Service at the Moments of Truth with Dr. Steve Albrecht (There will be a 15-minute morning break.) <i>Dr. Steve Albrecht (from Springfield, MO) has trained thousands of library employees on the do's and don'ts of handling challenging, entitled, odd, or even threatening patrons who may want to disrupt the library. His popular program offers practical and realistic tools which will make your facility a better, safer place to work.</i>
12 - 12:45 pm	Lunch
12:45 - 2:45 pm	Security Scenarios with Dr. Steve <i>Based on the morning workshop, take a deeper dive into security scenarios specific to MCPL and its branch locations.</i>
2:45 – 3:00 pm	Break
3 - 3:30 pm	Team Building Exercises with Jamie Matczak <i>WVLS Education Consultant Jamie Matczak will lead small groups into fun and collaborative team-building exercises.</i>
3:30 - 4:15 pm	Meditation and Relaxation with Mandy Wright <i>End the day relaxed and refreshed! Certified mediation and yoga instructor Mandy Wright will guide the group on breathwork, gentle movement, and mindful connection.</i>
4:15 - 4:30 pm	Wrap Up

RESULTS FROM SECOND QUARTER 2022 REPORT

APRIL – JUNE 2022

On May 11, 2022, J. Matczak and L. Giordano spoke on the phone about a potential keynote speaker located in California. On May 19, 2022, J. Matczak presented a tentative schedule for the annual in-service day. L. Giordano approved the schedule. J. Matczak reached out to Wausau Mayor and former MCPL/WVSL board member K. Rosenberg on local leaders who could serve as presenters in the afternoon segment of the in-service.

RESULTS FROM FIRST QUARTER 2022 REPORT

JANUARY - MARCH 2022

An MCPL staff in-service is scheduled for Friday, September 16, 2022. J. Matczak and L. Giordano planned to meet over the next few months to decide topics and speakers.

- **WVLS will create a system orientation for new MCPL employees to improve awareness of WVLS services, staff and assistance that can be given to each staff member based on their role.**

ACTIVITIES UPDATE

OCTOBER – DECEMBER 2022

December 2022

An in-person orientation is scheduled for new MCPL employees on Tuesday, December 13.

NWLS and WVLS Inclusive Services Consultant S. Machones will provide an inclusive services orientation for MCPL staff on Friday, December 9.

November 2022

A. Hetzel, who will be taking on MCPL's interlibrary loan work, attended training with Innovative to learn the Sierra Interlibrary Module on November 28. R. Metzler assisted A. Hetzel in getting in contact with DPI WISCAT representative Christine Barth to receive training on WISCAT. This training occurred on November 30.

RESULTS FROM THIRD QUARTER 2022 REPORT

JULY - SEPTEMBER 2022

On September 8, S. Machones reached out to L. Giordano to enquire about how best to provide an Inclusive Services Orientation for her and/or her staff.

On September 6, K. Zimmermann provided V-Cat orientation for K. Sabelko.

On August 16, A. Hamland met with L. Giordano to provide information regarding WVLS services in Youth, Teen, and Adult Consulting and a tour of the WVLS website as part of the orientation for new public library directors.

In early fall, WVLS produced a 7-minute "Introduction to WVLS" video in which viewers learn:

- How public library systems started
- The purpose of public library systems
- How public library systems are governed
- The unique history between Marathon County Public Library and WVLS
- Some of the ways WVLS supports its member libraries

The link to the "Introduction to WVLS" video was shared with the WVLS community in early September, and may also be found on the WVLS website at <https://www.wvls.org/about-wvls/> and viewed [here](#).

RESULTS FROM SECOND QUARTER 2022 REPORT

APRIL - JUNE 2022

On April 5, K. Zimmermann provided L. Giordano a brief V-Cat Orientation refresher. During the discussion, Giordano shared her experiences with V-Cat, and the needs of MCPL staff. K. Zimmermann welcomed feedback and further communication from MCPL team members as needs and concerns arise. Three items for follow up were noted: 1. cross county payments (follow up by M. Sepnafski); 2. possible duplication of effort in reports run by MCPL staff and WVLS staff (follow up by K. Zimmermann); and 3. WVLS and MCPL Overdrive Advantage Collections (follow up by R. Metzler).

In April, M. Sepnafski and J. Matczak met with L. Giordano to review expectations for this goal. L. Giordano suggested that a helpful tool to share with new MCPL Board members and staff would be a Digital Byte (WVLS digital training video) on WVLS, its operation, and how it supports member libraries. An outline for the training video was developed in May.

RESULTS FROM FIRST QUARTER 2022 REPORT

DECEMBER 2021 - MARCH 2022

In January 2022, WVLS Director M. Sepnafski and WVLS Administrative Assistant S. Hafemeister met with L. Giordano, to provide an introductory orientation about Wisconsin's library landscape and the system's operation and services.

In December 2021, J. Matczak met with L. Giordano to review the WVLS orientation process. J. Matczak shared information about public library certification processes and requisite documentation, including a WVLS *Digital Byte* training video that reviewed forms for public library certification.

Also in December 2021, K. Zimmermann provided a V-Cat orientation for A. Johnson.

- **WVLS will create *Digital Byte* training videos specific to MCPL professional development requests.**

ACTIVITIES UPDATE

OCTOBER – DECEMBER 2022

In October, WVLS produced, [Access to Justice](#), a training video developed through a collaboration with Elizabeth Manriquez from the UW-Wisconsin Law School Library. The third in a five-part series, this webinar discusses the Justice Gap, who it effects, and how libraries can assist.

In September, WVLS produced "[Discovering Legal Resources](#)," a training video developed through a collaboration with the Wisconsin State Law Library (WSLL). The second in a five-part series, this training features WSLL's Web Services Librarian Carol Hassler addressing quick tips on legal research.

RESULTS FROM THIRD QUARTER 2022 REPORT

JULY – SEPTEMBER 2022

In August, WVLS produced “[Navigating the Legal Reference Interview](#),” a training video developed through a collaboration with the Wisconsin State Law Library (WSLL). The first in a five-part series, training features WSLL’s Web Services Librarian Carol Hassler addressing how to handle legal reference questions.

In July, J. Matczak published a Digital Byte training called “[Tools for People with Disabilities](#),” in which she reviews five mobile tools that MCPL staff can recommend to library patrons.

Additional training videos developed in July include “[Finding Books By Grade Level](#),” which offers tips from Katie Zimmermann on finding books at a particular reading level, and more specifically, how to search Aspen for books using Accelerated Reader book level and Accelerated Reader interest level filters; and “[Breaking the Binary](#),” in which Sarah Wargin from Northern Waters Library Service discusses pronouns, gender identity, gender expression, and more.

RESULTS FROM SECOND QUARTER 2022 REPORT

APRIL – JUNE 2022

On April 29, 2022, J. Matczak connected with L. Giordano on *Digital Byte* training videos specific to MCPL professional development requests. L. Giordano contacted key MCPL staff members on feedback. Feedback was shared with J. Matczak via email on May 10, 2022. Topics for *Digital Byte* trainings include audio/video editing software tips and tricks, digitizing materials, storing local materials/archives, emerging technology/apps, free and easy software for publishing, and accessibility apps.

Technology & website support

- **Expectation Complete:** WVLS should work with MCPL's Library Services IT Technician to configure new discovery layer to work with MCPL's website to create a seamless transition with maximum functionality.

RESULTS FROM FIRST QUARTER 2022 REPORT

JANUARY – MARCH 2022

K. Zimmermann met with B. Krombholz, J. Kinney and A. Johnson as well as representatives from the MCPL Library Services Team to ensure the new Aspen Discovery library catalog would be configured to MCPL's expectations to best serve Marathon County library users. As part of this effort, K. Zimmermann met with B. Krombholz and J. Kinney eight times between November 2021 and March 2022 (11/23, 12/1, 1/19, 2/2, 2/9, 2/15, 3/2,3/9). Note that most WVLS libraries received one or two Aspen discovery consultations. Additional permissions were granted, and settings enabled as desired for MCPL customization.

On March 7, K. Zimmermann met with J. Kinney, K. Sullivan, T. Hornbeak, and other members of the MCPL Library Services Team to ensure that the desired collections and materials would be featured in the Aspen interface and provide an overview of opportunities for featuring library materials through lists, browse categories and collection spotlights.

Multiple training sessions were provided for staff, and recordings offered, to familiarize staff on how to use and configure the Aspen Discovery catalog, and ways in which library patrons will experience the catalog while searching, placing and managing holds, using patron account features, and paying fines. A month-long soft launch for MCPL staff began on February 14 so that staff could become comfortable with the interface before rolling it out to patrons.

WVLS Aspen Discovery staff created customizable promotional material and tutorial videos for library staff and patrons. A. Hamland created placards to promote online resources and special collections that display when library users search related keywords. For example, when a person searches "ancestry" or "family tree," an image and link for genealogy resources appears offering access to Ancestry Library Edition, Heritage Quest, historic and local newspapers, etc. Likewise, if someone searches "engine," links to online resources for auto-repair display.

Fiscal

- **Expectation Complete:** Annual cost-benefit analysis presented to MCPL's Board describing the services provided and the associated costs.

ACTIVITIES UPDATE

OCTOBER – DECEMBER 2022

The 2022 WVLS Costs and Benefits Fiscal Report is shared as Appendix E at the end of this report. WVLS will provide highlights of the report as part of its presentation to the MCPL Board on December 19.

- **Assist MCPL in finding and applying for grant opportunities as applicable.**

ACTIVITIES UPDATE

OCTOBER – DECEMBER 2022

In the November 14 issue of *Monday Mentions*, WVLS announced the opportunity for MCPL staff to apply for scholarship grants to attend the WEMTA (Wisconsin Educational Media and Technology Association) Conference in Rothschild in February 2023. This edition of *Monday Mentions* also shared the following grant opportunities:

- Wisconsin Humanities Grants (awards between \$2,000-10,000)
- Libraries Transforming Communities Grants (awards between \$10,000-20,000)
- Penguin Random House Grants (awards up to \$1,000)

In September, WVLS awarded H. Bain and S. Moscatello scholarships to attend the Wisconsin Library Association (WLA) Conference in Lake Geneva on November 1-4. J. Matczak was available in October to answer recipients' questions and advise them on how the conference could best meet their needs.

RESULTS FROM THIRD QUARTER 2022 REPORT

JULY - SEPTEMBER 2022

WVLS WLA Conference Scholarship; November 1-4

On September 5, 2022, member libraries were notified of the availability of full conference scholarships to attend the 2022 Wisconsin Library Association (WLA) Conference, that will be held in Lake Geneva on November 1-4. Valued at \$1,200, the scholarship will cover conference registration, transportation, three nights of lodging, and meal reimbursement.

Emergency Connectivity Fund (ECF) and American Rescue Plan Act (ARPA) Supported Projects

Two large technology service projects began during 2022 with ECF and ARPA support:

MOBILE HOTSPOTS: LEAN WI technology resource sharing partners IFLS, NWLS, and WVLS received notification of award for an application for 240 mobile hotspot devices and data plans. MCPL is allocated at least 18 devices and service plans (funded through 2022) valued at \$3,100. These devices are entering service during August and September. Additional devices may become available to allocate to MCPL during 2022 or 2023 depending on overall usage throughout WVLS and the LEANWI partnership, and if our third-round request for additional hotspots is awarded.

PUBLIC PRINTING MANAGEMENT: LEAN WI partners are supporting a large multi-site implementation of Princh Mobile Printing services, currently in progress. BYOD and Public Printing services valued at \$34,200 are available to MCPL, covering the Wausau location and all branches through at least the first quarter of 2027.

RESULTS FROM SECOND QUARTER 2022 REPORT

APRIL - JUNE 2022

WVLS Summer Performer Grant

The WVLS Board of Trustees approved a \$240 grant for each member public library and branch to apply toward contracts with summer library program performers. Public library directors and youth service librarians were notified of this opportunity in December 2021, February 1, and February 21, 2022. This year's WVLS grant opportunity will support 21 performances across the WVLS area throughout the summer.

Specifically, the grant will support a performance at seven MCPL locations for a total grant benefit of \$1,680.

Digitization Grants (see also p. 27)

Digitization projects are unique to each community, depending on the nature of each project, and format of items to be digitized. WVLS consultants assist member libraries in developing a plan for each digitization project and finding grant opportunities suited for project needs, grantor eligibility factors, and grant timelines.

A. Hamland and J. Kinney continued conversations in July and August regarding narrative writing for the National Endowment for the Humanities (NEH) National Digital Newspaper Program (NDNP) and other grant opportunities. J. Kinney completed the WiLS Ideas to Action Grant process with award notifications expected in late August or early September.

A. Hamland and K. Zimmerman met with MCPL Adult Services Librarian J. Kinney on April 19, May 18, and June 8 to outline the needs and progression for each digitization project she is leading. The Wausau area yearbooks project likely will require fewer decisions regarding digitization, metadata, copyright, and platform than the digitization of oral histories, Wausau Daily Herald, and genealogical materials.

WVLS WAPL Conference Scholarship; May 11-13

On April 6, member libraries were notified of the availability of full conference scholarships to attend the 2022 Wisconsin Association of Public Libraries (WAPL) Conference, held in Pewaukee on May 11 – 13. With a theme of INFINITE POSSIBILITIES, the goal of this year’s WAPL conference was for attendees to leave empowered to explore possibilities beyond their library and community.

Valued at \$800, the scholarship covered conference registration, transportation, two nights of lodging, and meal reimbursement. Interested recipients were asked to notify WVLS on April 13, and applications were due May 6.

Ideas to Action Fund (see also p. 27)

On Monday, May 16, WVLS notified member libraries about the WiLS Ideas to Action Fund. This fund provides grants of up to \$5,000, so all types of libraries can bring their project ideas to life. The Fund encourages partnerships and collaborations among WiLS members and with community partners, supports innovative and exploratory new work within the Wisconsin library community, and seeds the development of processes, methods, or resources that can be used by other libraries and cultural organizations. Proposals were accepted until June 6.

PLA Digital Literacy Workshop Incentive

On Monday, May 25, WVLS notified member libraries about the Public Library Association (PLA) Digital Literacy Workshop Training Incentive, supported by AT&T. The incentive program is designed to support library adoption of new digital literacy courses and training materials, which are freely available in English and Spanish at DigitalLearn.org. All public libraries in the U.S. were eligible to apply for one of two incentive amounts. Tier 1 incentive recipients will receive \$4,000 and be required to conduct a minimum of three workshops reaching a total of 18 learners. Tier 2 Incentive recipients will receive \$7,000 and be required to conduct a minimum of five workshops reaching a minimum of 50 learners. The application deadline was Friday, June 10, and recipients will be announced in August.

WVLS ARSL Conference Scholarship; September 14-17, 2022

On Monday, May 2, WVLS notified member libraries about the availability of full conference scholarships to attend the national 2022 Association of Rural and Small Libraries (ARSL) Conference. The 2022 ARSL Conference will be held in Chattanooga, TN, and will run from September 14-17. This conference is specifically designed for rural library staff. Previous conference topics have included building community advocacy, effective trustee recruitment, safety procedures, inexpensive programming ideas, innovative web services, customer service, and more.

Valued at \$1,800, the scholarship will cover conference registration, round-trip airfare, four nights of lodging, meal reimbursement, and more. The scholarship application deadline closed on Friday, May 20.

**RESULTS FROM FIRST QUARTER 2022 REPORT
JANUARY – MARCH 2022**

WVLS PLA Conference Scholarship; March 23-25, 2022

In November 2021, WVLS announced the availability of scholarships to attend the National Public Library Association Conference in Portland, Oregon on March 23-25. The scholarship offered \$3,000 toward travel and conference expenses for selected applicants. In December 2021, WVLS notified D. Richter and J. Kinney and 4 other area colleagues that their applications were selected for scholarships. A conference report from each of the PLA Conference scholars was shared with the WVLS Board of Trustees in May 2022 and is available [here](#).



WVLS PLA Conference Scholarship Recipients (L to R): Jennifer Davis, Minocqua Public Library; Laurie Ollhoff, T.B. Scott Free Library – Merrill; Elisha Sheffer, Rhinelander District Library; **Dan Richter** and **Julie Kinney**, Marathon County Public Library; and Ashley Polinski, Rhinelander District Library.

WVLS Library Legislative Day Scholarship; February 3, 2022

A WVLS scholarship to participate in the 2022 Wisconsin Library Legislative Day (LLD) was offered to member public library staff. Sponsored by the Wisconsin Library Association, LLD was held on February 3 in Madison. (See also mention below under Additional Items of Information)



Library Legislative Day: Mike Otten and Sonja Ackerman (WVLS Trustees from Marathon County), Laurie Ollhoff (Marathon Co. resident and Assistant Director at T.B. Scott Free Library – Merrill), Senator Jerry Petrowski, Angela Bodzislav (Spooner Public Library Director), and Sherry Machones (Northern Waters Library Service Director)

Additional Activities

Library Advocacy

ACTIVITIES UPDATE

OCTOBER – DECEMBER 2022

K. Zimmerman provided MCPL with a list for each of the titles under reconsideration at MCPL showing what libraries in Wisconsin own the titles and where in the libraries' collections the titles are shelved.

WVLS submitted a letter and an accompanying infographic to the Marathon County Board of Supervisors requesting that funding for MCPL be preserved in the 2023 county budget. A copy of the document is shared in Appendix F.

RESULTS FROM THIRD QUARTER 2022 REPORT

JULY – SEPTEMBER 2022

On August 23, K. Zimmermann provided reports detailing the value of library materials to the community similar to the "You just saved \$__._ by using your library card!" message that appears on patron receipts. Two sets of data and reports were prepared. The first detailed the value of items owned by MCPL circulated at any V-Cat location. The second gave the estimated value of V-Cat items circulated at MCPL locations (regardless of ownership). The reports are valuable for library advocacy during the Marathon County budgeting season and were provided within a quick turnaround time as requested by A. Johnson.

WVLS Promotes Library Card Sign-Up Month

On August 15, WVLS added its member libraries to the statewide [getyourlibrarycard.org](https://www.getyourlibrarycard.org) website that directs Wisconsin residents to sign up for digital library cards for their county and library. To help promote this resource during Library Card Sign-Up Month in September and beyond, public library system marketing consultants designed high-quality, vinyl, die-cut stickers that can be placed on water bottles, laptops, phone cases and more. In early September, all MCPL locations received stickers to hand out to library patrons and community members.

RESULTS FROM SECOND QUARTER 2022 REPORT

APRIL – JUNE 2022

WVLS 2021 System Information & Public Library Statistics

Produced annually, the *WVLS 2021 System Information & Public Library Statistics* booklet presents member library service trends from data recorded in members' annual reports and highlights how libraries benefited their communities in 2021. The booklet also shares the benefits of the system/member library partnership and mentions some of the system's key accomplishments in 2021. The booklet is distributed to member public library directors and library board Presidents, county library board chairs, municipal and county clerks, and area legislators.

RESULTS FROM FIRST QUARTER 2022 REPORT

JANUARY – MARCH 2022

WVLS Advocates for Libraries at WLA's Library Legislative Day

Two of the five attendees from WVLS counties at 2022 Library Legislative Day on February 8 were appointed to the WVLS Board of Trustees by the Marathon County Board to represent Marathon County. In addition to WVLS Trustees Mike Otten and Sonja Ackerman, Laurie Ollhoff (Wausau resident and Assistant Director at TB Scott Free Library, Merrill) also attended from Marathon County. Ackerman reached out to L. Giordano prior to the event to inquire whether there were specific MCPL services, programs, stories, or concerns that she could carry into the appointments with six area legislators visited by herself and Otten. Information about LENA Start, virtual content, grab-and-go STEAM theme craft kits and value-added services provided by MCPL during the pandemic was shared.

Continuing Education and Consultation

ACTIVITIES UPDATE

OCTOBER – DECEMBER 2022

On October 7, K. Wendt consulted with MCPL Services Manager K. Sabelko regarding the pros and cons of MCPL staff serving as witnesses for absentee ballot voters under current WI Election Commission rules resulting from recent court cases. K. Wendt offered to have further conversation with anybody else from MCPL who had questions. It was suggested that K. Sabelko have conversations with the Marathon Co. Clerk and Corporation Counsel as she considers potential implementation of this service in 2023.

RESULTS FROM FIRST QUARTER 2022 REPORT

JANUARY – MARCH 2022

In late 2021, WVLS consulted with MCPL Youth Services staff about virtual storytime and MCPL virtual programming technologies, and on planning in-person programming using COVID-19 safety precautions.

WVLS also consulted on recommended processes when receiving material concerns from the public and recent intellectual freedom challenges occurring in schools and libraries nationally.

Collection Development and Readers Advisory

ACTIVITIES UPDATE

OCTOBER – DECEMBER 2022

December 2022

WVLS prepared a collection inventory / review list of the oldest and least used titles at each V-Cat library for use as a weeding advisory tool.

November 2022

Reader's Advisory tools in Aspen were highlighted during the November V-Cat Council meeting.

September 2022

WVLS hosted a V-Cat Collection Development meet up on Thursday, September 29. The group reviewed the results of the V-Cat Collection Development Practices Survey, and shared resources for selecting new materials and weeding materials. Notes and slides were shared with all V-Cat staff participating in collection development.

The group identified a number of possible projects for collection development collaborations and identified the following as high priority:

- Encouraging participants to connect with other library staff working on collection development via an email group established by WVLS.
- Developing a list of staff at V-Cat libraries that are willing to serve as subject experts to recommend titles or answer questions. WVLS created a shared document for this purpose.
- A collection inventory / review list of the oldest and least used titles at each V-Cat libraries for use as a weeding advisory tool.
- Sierra Decision Center reports training

The group plans to meet again in late February or early March 2023.

RESULTS FROM THIRD QUARTER 2022 REPORT

JULY – AUGUST 2022

In September, training information for creating and sharing lists within Aspen was shared at the V-Cat Council Meeting.

In August, training information for creating and sharing lists within Aspen was provided to J. Peterson, and E. Lutz.

RESULTS FROM FIRST QUARTER 2022 REPORT

To highlight and promote library collections, A. Hamland and K. Zimmermann work with member libraries to incorporate curated book and other material lists they wish to market into the new Aspen Discovery catalog. This includes displays of book covers or other materials in a browsable display on websites.

Administration

ACTIVITIES UPDATE

OCTOBER – DECEMBER 2022

M. Sepnafski and J. Matczak attended a November 15 meeting with DPI and colleagues from the IFLS, Northern Waters, Nicolet and Outagamie-Waupaca systems to review the PLSR (Public Library System Redesign) recommendations, discuss our courier operations and consider ways to make our operations more efficient and cost effective.

RESULTS FROM THIRD QUARTER 2022 REPORT

JULY – SEPTEMBER 2022

In August, M. Sepnafski began collecting county plans from other consolidated county library systems to prepare a draft MCPL Plan to share with L. Giordano.

RESULTS FROM SECOND QUARTER 2022 REPORT

APRIL – JUNE 2022

In May, M. Sepnafski provided L. Giordano with salary information from other system resource libraries, libraries with service populations comparable to MCPL, other consolidated county libraries and libraries having an annual revenue similar to MCPL. The list of peer library data was requested for Marathon County’s classification and compensation study.

RESULTS FROM FIRST QUARTER 2022 REPORT

JANUARY – MARCH 2022

WVLS monitors the Department of Public Instruction’s Public Library System Redesign (PLSR) activities and participates in PLSR-related activities and discussions. Most recently, staff participated in a Wisconsin Library System Directors meeting with DPI to learn about grant opportunities for collaboration among library systems in areas of discovery and resource sharing over the next five years.

APPENDIX A: WVLS Continuing Education Survey Analysis

WVLS is partnering with the IFLS Library System (IFLS), Northern Waters Library Service (NWLS) and the Southwest Wisconsin Library System (SWLS) to plan and host a series of webinars for our member libraries in 2022. In the area of continuing education and professional development, several library systems across the state have multi-system partnerships for this purpose.

To drive the direction for webinar topics, member libraries in WVLS and partnering systems are asked to share their continuing education priorities through an annual survey sent to all library staff early in the year. The January 31, 2022, survey elicited responses from 14 MCPL staff members. Results from this recent survey, follow.

1) Which general topic areas would be helpful as a 60-minute webinar in February - May 2022?

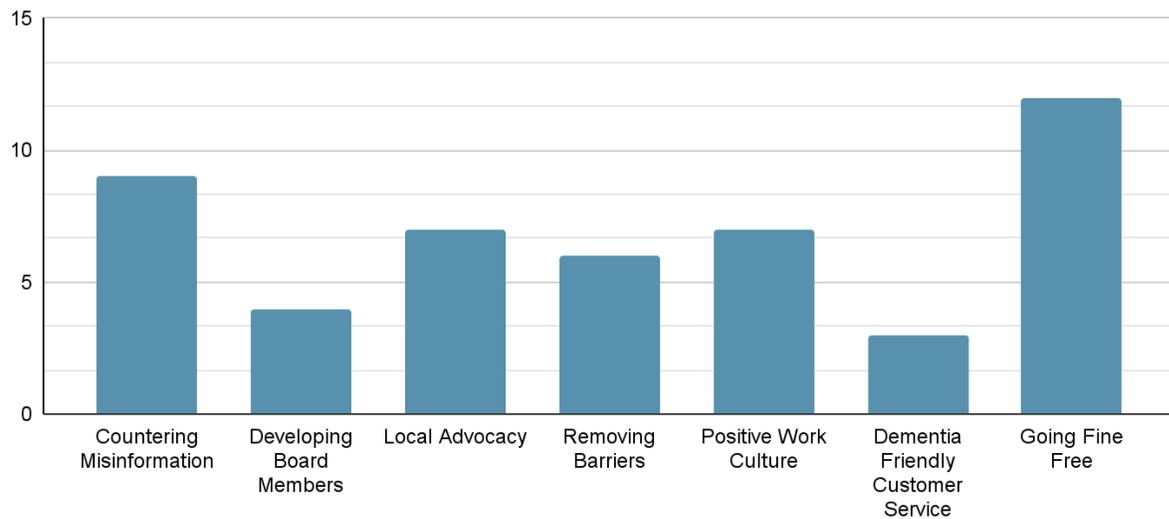
There were 12 topic choices in this question, decided by trends and feedback from librarians in WVLS, IFLS, NWLS and SWLS. Respondents were asked to select their top six.

- Countering Misinformation
- Positive Work Culture
- Local Advocacy
- Improving Access/Removing Barriers
- Inclusive Weeding
- Materials Challenges
- Time Management
- Dementia Friendly Customer Service
- Promoting and Engaging in Civic Dialogue
- Developing Board Members
- Removing Barriers
- Starting a Friend's Group

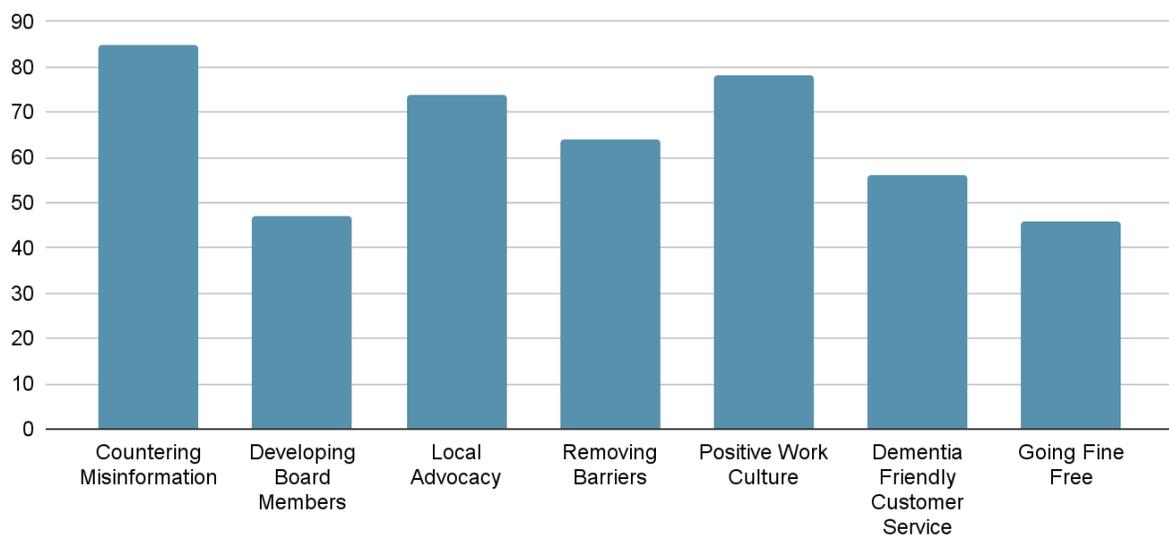
Following is a graph of the top preferences of MCPL staff followed by a graph showing the top choices from all staff from libraries in the system partnership.

The topic "Going Fine Free" scored high among MCPL survey recipients; overall it was ranked #10 out of the 12 topic choices. Countering Misinformation, Positive Work Culture, and Local Advocacy also scored high.

MCPL Responses



All Responses



The top responses from libraries in WVLS IFLS, NWLS and SWLS were Countering Misinformation, Positive Work Culture, and Local Advocacy.

Based on this survey feedback, the following topics were selected for the “Spring Webinar Series” presented in April-May 2022.

April 19: Enhancing Your Workplace Culture

April 28: Where Does the Money Come From? Public Library Funding in Wisconsin

May 5: Public Libraries and Fake News

Because some librarians have limited time to take surveys, a question about youth service topic areas was included in this year’s survey.

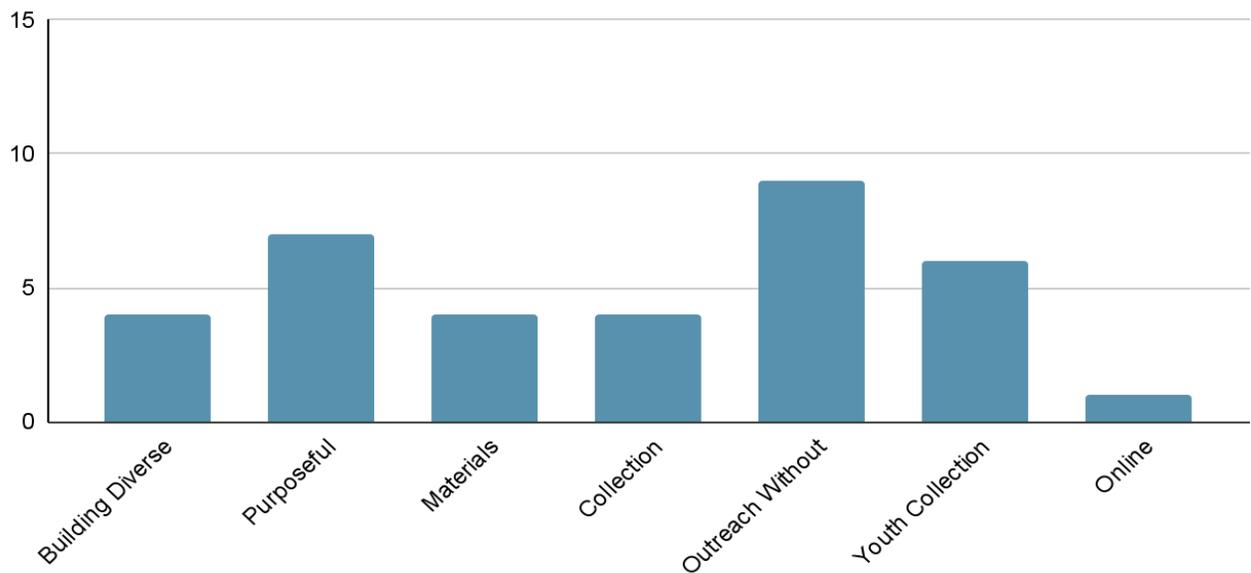
2) Which youth services areas would be helpful as a 60-minute webinar in February - May 2022?

There were 7 topic choices in this question, decided by trends and feedback from librarians in WVLS, IFLS, NWLS and SWLS. Respondents were asked to select their top three choices.

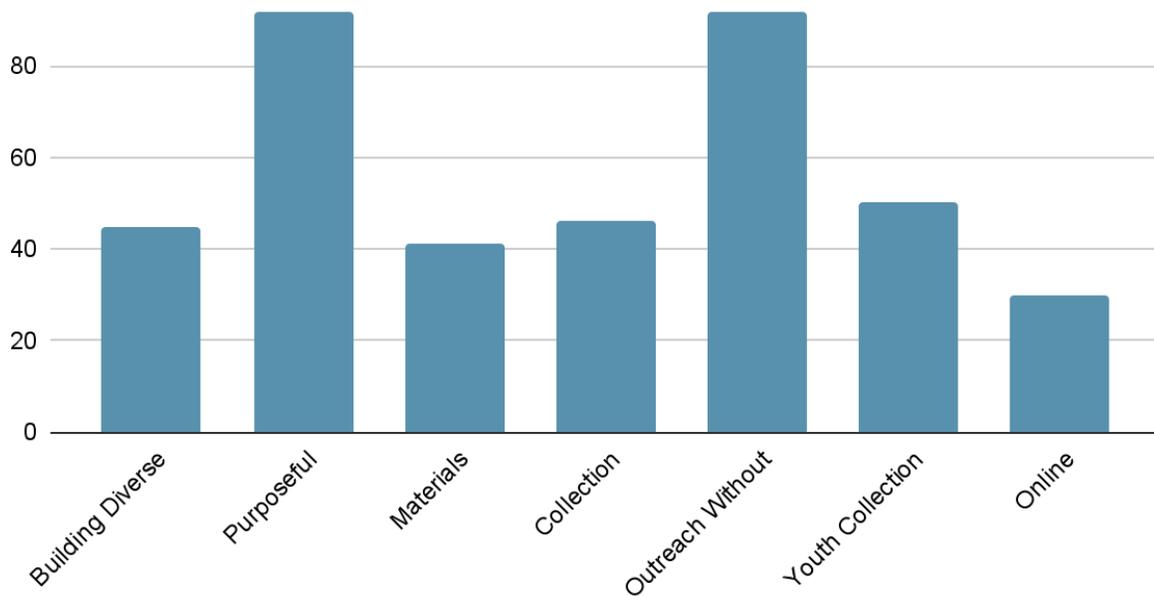
- Building Diverse Collections
- Collection Management Basics
- Materials Challenges
- Online Registration for Summer Programming
- Outreach without Overextending
- Purposeful Program Idea Slam
- Youth Collection Shelving Systems

The topics of Outreach without Overextending, Purposeful Program Idea Slam, and Youth Collection Shelving Systems were the top choices for MCPL.

MCPL Responses



All Responses



Above are the responses from librarians in WVLS, IFLS, NWLS and SWLS. Similar to the responses from MCPL, the topics of Outreach without Overextending, Purposeful Program Idea Slam, and Youth Collection Shelving Systems scored the highest.

The WVLS system plan states that WVLS will “sponsor a minimum of nine (9) contact hours annually of continuing education opportunities relating to youth and young adult services.” Librarians serving youth benefit from all webinars even if the content is not directly related to youth services and programs.

In addition to guiding the focus for the annual WVLS Youth Services Workshop held in December, topics selected by librarians serving youth are incorporated into WVLS Youth Services Information Exchange (YSIE) discussions scheduled throughout the year.



WVLS Youth Services Consulting



Youth Services Meetups

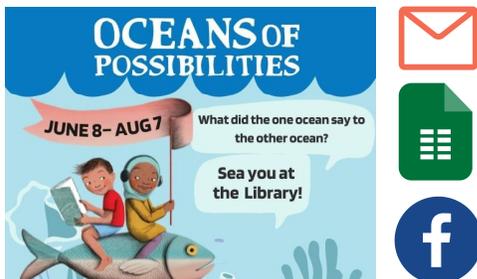
- Programs & Services
- Professional Topics
- In-person: opportunities for conversation, bonding, mentorship
- Virtual: Inclusive opportunity for small staff, no travel necessary



Anne Hamland
Public Library
Services Consultant

Personal Consultation

- On demand confidential assistance
- Recent topics: material challenges & concerns, planning a summer program, building a successful storytime, evaluating programs & services



Tools & Templates

- Youth Services Facebook Group, Email Listserv, and Resource Webpages: communications are duplicated to offer access for any communication preference
- Collaborative Performer Booking Sheet
- Take & Make Idea Sharing
- Summer Library Program Social Media Marketing Templates
- Summer Library Program Print Reading Log Templates



Youth Librarian Professional Opportunities

- *WLA Membership* and Conference Professional Scholarship
- Library Legislative Day, Wisconsin Association of Public Libraries, Wisconsin Educational Media & Technology Association, Association for Rural and Small Libraries, Public Library Association, American Library Association.
- WVLS Innovation and Collaboration Literacy Grant

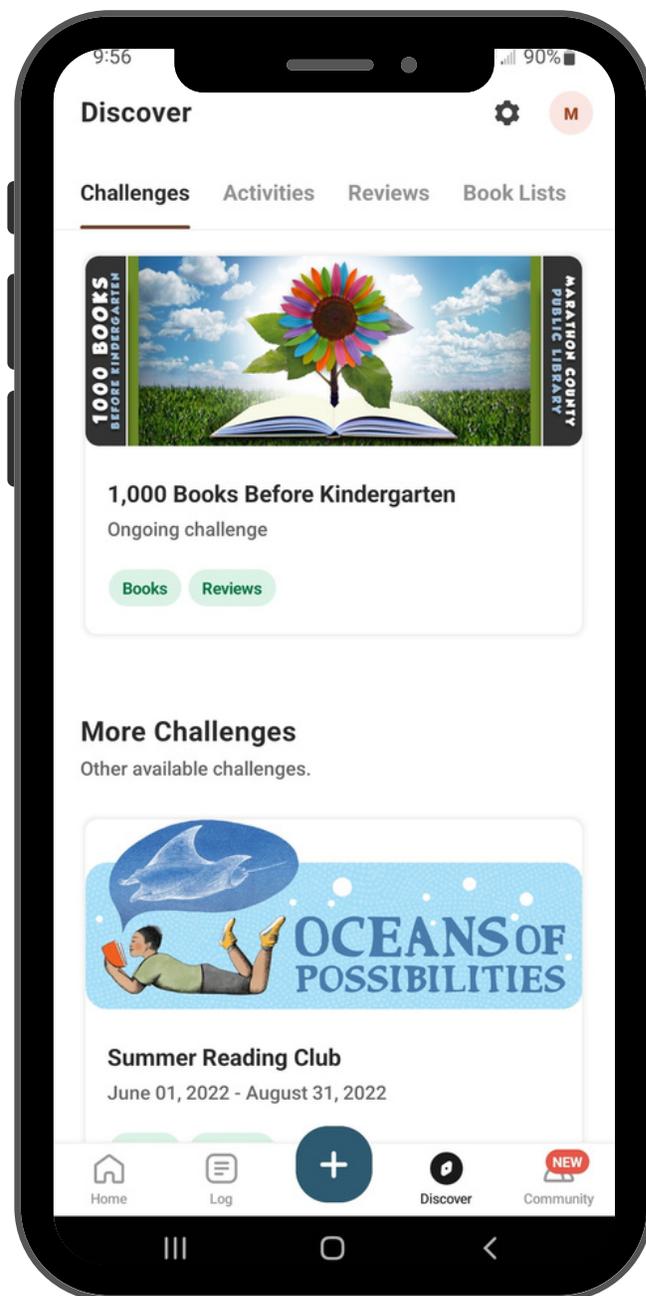


The Wisconsin Department of Public Instruction's Division for Libraries and Technology issued a \$327,000 grant to WVLS in May 2020 and a second grant in August 2021 for \$277,000 to serve as the fiscal agent for a three-year contract with Beanstack, on behalf of all public and school libraries across Wisconsin.

“**Beanstack makes it easy for patrons to register, track reading, and earn incentives while libraries gain data-driven insights.**”

FEATURES

- Online platform and mobile app
- Specializes in reading challenges for all ages, all year long
- Customizable for every library
- Enhances virtual connections with users
- Complements offline programs
- Accessible via individual library webpages and mobile devices
- Simple and effective report and statistical dashboard for librarians



Marathon County Public Library

mcpl.us/research/online/virtual-reading-club-beanstack



[web access](#) [Apple iOS app](#) [Google Play app](#)

Use Beanstack to track your reading and participate in a variety of reading challenges, such as 1,000 Books Before Kindergarten, 100 Books Before Graduation and our Summer Reading Club!

To get started:

1. Use the links on this page to install the Beanstack app on your smartphone or tablet, or use the "Web Access" link on your computer.
2. Register yourself and/or your family members that want to participate.
3. Review the available reading challenges, and start logging your accomplishments.
4. As you earn rewards, please follow the instructions to pick them up.

Please note: Not all age groups will have challenges available year-round, but you can still use the app to track your reading on your own.

If you have any questions or experience difficulty, please contact us!



APPENDIX C: Subject Headings Maintenance

Question raised during the July 18, 2022 MCPL Board of Trustees meeting:

How does WVLS ensure that bibliographic records have subject headings?

WVLS Response from WVLS Cataloger Rachel Metzler:

Cataloging work is an effort that is ongoing. Bibliographic records are improved over time by the collaborative effort of all V-Cat member library catalogers working with WVLS staff responsible for V-Cat administration and maintenance.

Following are the steps taken for ongoing maintenance of subject headings in bibliographic records.

GOAL: Ensure all V-Cat catalogers are saving the most complete records into the V-Cat database. The V-Cat database contains two main types of bibliographic records: temporary and full. This effort is to monitor and maintain the quality of the full records.

ACTION STEPS:

- 1) V-Cat Cataloging training is offered twice a year to all V-Cat cataloging staff in the consortium. These trainings continue to emphasize the importance of subject headings to the patron search experience. Additional training is offered to member library staff upon request or when WVLS sees a need.
- 2) A [resource document](#) has been provided to all libraries in the V-Cat ILS consortium that clearly states what is required in a full bibliographic record before it can be saved to the database. This document states that no bibliographic record should be saved as a full record into the V-Cat database if it does not contain Library of Congress subject headings.
- 3) A [V-Cat Recommendation](#) details that all V-Cat catalogers must be trained by a WVLS staff member and that cataloging privileges can be removed if standards are not met.

GOAL: Ensure WVLS remains aware of records that do not have subject headings and expedites clean-up when necessary.

ACTION STEPS:

- 1) WVLS staff will monitor full bibliographic records with monthly queries of the database. This query will seek out bibliographic records without subject headings that are not marked as temporary.
- 2) WVLS staff will follow up with V-Cat catalogers to alert them to the error and request that the records be cleaned up.



MCPL Board Meeting

September 19, 2022

WVLS Expectations Quarterly Update

Jamie Matczak

Continuing Education(CE) Opportunities

- 7 public library system CE Consultants; meet monthly
- In 2021, WVLS offered 61 hours of CE opportunities
- 3 annual webinar series: Wild Wisconsin Winter Web Conference, Wisconsin Trustee Training Week, Tech Days Webinars
- Spring and Fall webinar series with the IFLS Library System, Northern Waters Library Service and the Southwest Wisconsin Library System; with the DPI or from other library systems
- MCPL Staff Inservice Day (2021 and 2022)
- 250 webinars announced in *Monday Mentions*
- Full conference scholarships for 20 of our members: Association of Rural and Small Libraries Conference, Public Library Association Conference, Wisconsin Library Association Conference
- Full scholarships available for the WLA Conference, Nov. 1-4 in Lake Geneva. Application deadline is Friday, Sept. 23.

Training

- Digital Bytes: prerecorded and captioned digital trainings that are no more than 30 minutes long
 - 90 Digital Bytes have been created and archived
 - Examples of topics include: what to include in a library job posting, tools for people with disabilities, tips for unpleasant conversations, and more
 - Currently partnering with the Wisconsin State Law Library to create a series on law and legal reference
 - Webinar and in-person presentations for the Marquette University Library, the Door County Library (part of the Nicolet Federated Library System), Beloit Public Library (part of the Arrowhead Library System), Somerset County Library System in New Jersey, and the Portage County Public Library (part of the South Central Library System)
 - Teach classes offered through UW-Madison's Ischool

Ways that WVLS has Connected MCPL Staff with Colleagues from Similar-sized Libraries

- WVLS paired MCPL Director Leah Giordano with Sarah Sugden, the director of the Brown County Library (BCL)
- Networking Opportunity: MCPL's Youth Services Librarian Taylor Weinfurter and Rothschild Branch Coordinator Laura Wood met with their counterparts at BCL, Youth Services Manager Katie Guzek and Deputy Director Emily Rogers

Processes for Learning What Topics are Most Needed

- Discussions of the WVLS Library Advisory Committee and V-Cat Council
- Annual surveys
- Conversations
- Monitoring professional blogs, listservs, and journals
- Brainstorming ideas with the 6 other CE Consultants
- Recommendations from the MCPL Staff and Board are appreciated and welcome

APPENDIX E: 2022 WVLS Costs and Benefits Fiscal Report

In November 2021 the Marathon County Public Library (MCPL) Board adopted the 2022 WVLS Expectations Assessment Worksheet, asking Wisconsin Valley Library Service (WVLS) to help develop an annual cost-benefit analysis measuring the benefits of services provided and the associated costs. WVLS provides many system membership benefits with no fees or charges to libraries and a number of resource sharing management and support benefits for third party licensing and services shared by libraries. Most of the costs associated with WVLS services are passed through directly or indirectly from their respective vendors.

A cost benefit analysis answers two questions: “What is the cost?” and “What is the benefit?” This report addresses each question though it does not delineate each of the benefits or reflect alternative options with comparative projections. This report generally reflects tangible benefits with measurable and quantifiable amounts and does not include more complex analysis strategies like sensitivity analysis for most sections.

Findings

WVLS provided MCPL with tangible benefits of not less than \$349,434 in 2022. Additional unquantified benefits for various services such as Consulting are noted but not measured. The overall cost realized by MCPL was \$96,309. Details on how these amounts are derived are provided in this Fiscal Report.

Fiscal Report

The services provided by WVLS are available to all twenty-five member public libraries. Most services are available at no charge. Some are supported in full or in part by member libraries through cost sharing models or direct cost passthroughs. This Fiscal Report is a deep summary of the costs and offsets of service elements provided, managed, or supported by WVLS. It reflects the minimum readily quantifiable value of WVLS membership benefits available to MCPL during 2022.

WVLS Consulting and some other system membership benefits (services provided at no cost to libraries) included in this report represent a combination of tangible and intangible benefits to MCPL but do not include a valuation. Additionally, this report does not include sensitivity analysis to determine estimated cost-of-service differences between shared and stand-alone strategies for shared resources. Therefore, while the total quantified value of MCPL's costs is complete and accurate, the total quantified value of benefits reflected in the Findings above is under-reported in this initial iteration of annual costs and benefits reporting.

The services listed in Categories A-J correlate with system service mandates outlined in Wisconsin Stat. 43.24[2] and in the 2022 WVLS Plan of Service. Within each service, a chart is provided that summarizes fiscal exchange and measurable values of benefits between MCPL and WVLS. The charts only reflect amounts for any given service element when quantifiable values are known. The four columns in which data is reported as expenses and revenue include:

WVLS Columns

- **WVLS Receipts:** this column reflects the actual amount WVLS receives from MCPL for a product or service. The amounts in this column are offset by the amounts reported in the MCPL Expense column.
- **WVLS Expense:** this column reflects the actual amount WVLS paid to MCPL, the actual amount available to MCPL for a service or product, the measured financial benefit of a service WVLS offered to MCPL, the actual amount WVLS paid to a third party for a direct pass-through action, or the resource sharing formula-adjusted amount of the actual amount WVLS paid to a third party for licensing or services shared by member libraries. The amounts in this column are offset by the amounts reported in the MCPL Benefit column.

MCPL Columns

- **MCPL Benefit:** this column reflects the actual amount MCPL received from WVLS, the measured financial benefit of a service WVLS offered to MCPL, or the measurable minimum cost offset benefit of MCPL's support of a shared resource. The amounts reported in this column are offset by the amounts reported in the WVLS Expense column.
- **MCPL Expense:** this column reflects the actual amount MCPL paid to WVLS for a product or service. The amounts reported in this column are inverse to the amounts reported in the WVLS - Revenue from the Library column.

A. Reference, Referral, and Interlibrary Loan

WVLS maintains the catalogs of 25 member libraries aggregated in an online database known as “V-Cat.” This resource serves as the primary vehicle for interlibrary loan (ILL) directly among WVLS public libraries. All public library systems in Wisconsin maintain similar databases for their respective member libraries. The Wisconsin Department of Public Instruction (DPI) maintains an online database known as “WISCAT” which serves as the ILL mechanism enabling public and nonpublic libraries in other public library systems throughout Wisconsin to fill requests from patrons of WVLS member libraries for items not found or available in V-Cat. **WVLS does not charge for ILL related consultation or direct ILL training and support services.**

Services	WVLS		MCPL	
	Receipts	Expense	Benefit	Expense
Coordination with DPI's RL&LL Team	\$ -	\$ -	\$ -	\$ -
WISCAT ILL Training	\$ -	\$ -	\$ -	\$ -
Promotion of DPI's BadgerLink Databases	\$ -	\$ -	\$ -	\$ -

Coordinate with RL&LL and Libraries:

WVLS coordinates with the Resources for Libraries and Lifelong Learning (RL&LL) team at DPI to empower member libraries and maximize the utility of ILL practices and mechanisms. Major efforts include:

- Participating in state-sponsored ILL meetings and training sessions
- Ensuring relevant information and data is forwarded to ILL staff at member libraries
- Assisting appropriate member library staff to locate and subscribe to interlibrary loan communication channels
- Helping all participating ILL libraries to understand and follow interlibrary loan best practices
- Working toward full participation in interlibrary loan services by all member libraries.

Provide WISCAT ILL Training:

WVLS provides training upon request or as issues arise that indicate training would be meaningful.

Promote DPI's BadgerLink Databases:

WVLS shares annual usage data with member libraries, provides authentication services for BadgerLink and WVLS databases, promotes BadgerLink training from DPI, and offers training upon request.

B. Continuing Education

WVLS provides in-service training for participating public library personnel and trustees. To support this commitment, WVLS attends DPI-sponsored Continuing Education Consultants meetings on behalf of members; surveys member libraries to assess the continuing education and training needs of their staff and trustees; sponsors/co-sponsors workshops and webinars; markets continuing education opportunities available from other systems, library associations and businesses; monitors certification processes of member library directors and validates their continuing education activities; offers orientations for new library staff and trustees; and provides a mentorship program. **WVLS does not charge member libraries for continuing education services.**

Services	WVLS		MCPL	
	Receipts	Expense	Benefit	Expense
WVLS Mentorship Program; Travel	\$ -	\$ (115)	\$ 115	\$ -
WVLS Sponsored Trip to Peer Library	\$ -	\$ (119)	\$ 119	\$ -
Workshops and Webinar Opportunities	\$ -	\$ (3,349)	\$ 3,349	\$ -
Digital Byte Training Videos	\$ -	\$ -	\$ -	\$ -
Scholarship Opportunities	\$ -	\$ (11,825)	\$ 11,825	\$ -
Support for MCPL Trustee on WVLS Board	\$ -	\$ (2,550)	\$ 2,550	\$ -
	\$ -	\$ (17,958)	\$ 17,958	\$ -

Mentorship Program and WVLS Sponsored Trip to Peer Library:

WVLS provides a peer-to-peer mentoring program for new public library staff. In 2022, WVLS paired the new MCPL Director with the Brown County Library Director. The WVLS subsidy of \$115 reimbursed the Brown County Library Director’s visit with the MCPL Director in Wausau. WVLS partially covered the MCPL staff visit to the Brown County Library at a cost of \$119.

Workshop and Webinar Opportunities:

WVLS plans all continuing education opportunities in accordance with requirements set forth in the Certification Manual for Public Library Directors published by DPI’s Division for Libraries and Technology. In 2022, WVLS partnered with the IFLS Library System, Northern Waters Library Service and Southwest Library Service to plan a series of webinars in the spring and fall. WVLS coordinated and hosted the nationally renowned Wild Wisconsin Winter Web Conference with funding from DPI and a \$230 contribution from each public library system. WVLS co-sponsored the annual Trustee Training Week and Tech Days webinars at a cost of \$114 per system. In addition, a WVLS subsidy of \$3,349 supported a speaker for MCPL’s staff development day. WVLS will provide a total of 40.5 hours of continuing education hours in 2022 through 35 webinars and 2 in-person workshops.

Digital Byte Training Videos:

Each year, WVLS produces and captions digital training videos for member colleagues to view at their convenience. Usually less than 30 minutes in length, over 90 of these “bite-sized” trainings have been produced by WVLS thus far, with 12 new trainings developed in 2022. Topics range from “Discovering Legal Resources” to “Tools for People with Disabilities” to “Free Stock Photos” to “The Role of Positive Body Language.”

Scholarship Opportunities: Several scholarships have been offered to MCPL in 2022: A \$125 class registration for the MCPL Director, a \$500 scholarship to participate in WLA’s Library Legislative Day, two \$3,000 scholarships to attend the Public Library Association Conference, one \$800 scholarship to attend the Wisconsin Association of Public Libraries Conference, one \$2,000 scholarship to attend the Association of Rural and Small Libraries Conference, and two \$1,200 scholarships to attend the Wisconsin Library Association Fall Conference.

Support for MCPL Trustee on WVLS Board: The WVLS Board of Trustees supports the continuing education needs of staff and board members. As part of this commitment, WVLS pays for annual WLA memberships for trustees (\$50) and offers reimbursements to attend WLA’s Library Legislative Day (\$500), WAPL Conference (\$800) and WLA Conference (\$1,200).

C. Consulting

WVLS staff freely consults with colleagues with specialized knowledge at other systems across the state and with DPI when assisting member libraries with problem solving and innovative planning. MCPL has direct access not only to the full WVLS team but also access through the team to a collaborative network of expertise that is both broad and deep. Topics covered include: adult services, readers advisory, reference services and community outreach; local, county and state library advocacy; collection development, including selection, weeding, policy development, recommended practices and intellectual freedom; grant writing and fundraising; library administration, including budget development, salary comparisons, policy development, managing staff, strategic planning; library law; marketing, infographics, website design, library card sign-up month toolkit, WVLS Statistics Booklet; and library space planning. **WVLS does not charge member libraries for consulting services.**

Services	WVLS		MCPL	
	Receipts	Expense	Benefit	Expense
Adult Services	\$ -	\$ -	\$ -	\$ -
Advocacy; Municipal, County, State	\$ -	\$ -	\$ -	\$ -
Collection Development	\$ -	\$ -	\$ -	\$ -
Library Administration	\$ -	\$ -	\$ -	\$ -
Library Law	\$ -	\$ -	\$ -	\$ -
Marketing	\$ -	\$ -	\$ -	\$ -
Space Planning	\$ -	\$ -	\$ -	\$ -
Technology Planning	\$ -	\$ -	\$ -	\$ -

D. Delivery

WVLS is responsible for the electronic delivery of information and physical delivery of library materials to participating libraries. **There is no charge to member libraries for delivery services.**

Services	WVLS		MCPL	
	Receipts	Expense	Benefit	Expense
Electronic Delivery of Information	\$ -	\$ -	\$ -	\$ -
Physical Delivery of Information				
Delivery Supplies	\$ -	\$ -	\$ -	\$ -
Regional Delivery	\$ -	\$ (48,006)	\$ 48,006	\$ -
State Delivery	\$ -	\$ (556)	\$ 556	\$ -
	\$ -	\$ (48,562)	\$ 48,562	\$ -

Electronic Delivery of Information:

Guided by a communications and marketing plan that outlines processes for communications to/from member library staff and trustees, WVLS publishes a weekly *Monday Mentions* email; a monthly newsletter, and a biweekly *Digital Lites* blog post. We also maintain a website, a general Facebook page as well as one for librarians who serve youth, and 12 email lists for library staff and trustees on services/topics of interest.

Delivery Supplies:

WVLS purchases delivery supplies such as bins, totes, label holders and packing tape on behalf of member libraries.

Regional Delivery:

WVLS fully subsidizes three courier stops per week for each public library location using Waltco, Inc. for regional delivery. The monthly fee includes three charges: courier stops, fuel surcharge and a flat fee for sorting materials into bins. In 2022, WVLS anticipates it will pay Waltco \$186,684. This amount divided by 35 locations equals \$5,334. \$5,334 x 9 MCPL locations equals a benefit of \$48,006. Note: This estimate gives each location equal weight and does not consider volume. Additional customized courier stops are available at a reduced cost.

State Delivery:

WVLS fully subsidizes three stops per week for the statewide delivery service to cover materials member libraries either receive from other libraries or are loaning to other libraries via DPI's WISCAT interlibrary loan program. In 2022, the cost for this delivery service was \$13,900. This amount divided equally by 25 public libraries equals \$556 each.

E. Collection Development

WVLS purchases resources to support the information needs of our member libraries and the communities they serve. The list of resources purchased includes online databases, materials for the WVLS professional collection, subscriptions to professional journals that are routed to libraries upon request, and items for the specialized makerspace collection. Further, WVLS offers guidance on digitization projects (best practices, grant opportunities and developing community partnerships), policy development, weeding and inventory projects, readers' advisory and reference collection resources, collaborative collection development, promotion and marketing efforts including website and Aspen support. **There is no charge to member libraries for the collection resources WVLS purchases.**

Services	WVLS		MCPL	
	Receipts	Expense	Benefit	Expense
Collection Development Grant	\$ -	\$ (10,000)	\$ 10,000	\$ -
Databases	\$ -	\$ (28,171)	\$ 28,171	\$ -
Makerspace and Programming Kits	\$ -	\$ (38,587)	\$ 38,587	\$ -
Wisconsin Public Library Consortium (WPLC)	\$ -	\$ (1,692)	\$ 1,692	\$ -
WPLC OverDrive Collection	\$ -	\$ -	\$ -	\$ -
WVLS OverDrive Advantage Collection	\$ -	\$ (69,402)	\$ 69,402	\$ -
	\$ -	\$ (147,852)	\$ 147,852	\$ -

Collection Development Grant:

As part of the MCPL/WVLS Resource Library Agreement, WVLS offers MCPL an annual \$10,000 grant to expand the breadth and scope of its fiction and nonfiction collections.

Databases:

WVLS subscribes to several databases on behalf of member libraries. Resources include Ancestry, \$6,688; Foundations in Wisconsin, \$155; Gale Courses, \$23,800; and Novelist Plus and Novelist Select, \$9,289. WVLS contacted product vendors and learned that if MCPL were to purchase the aforementioned products, database

costs would be Ancestry, \$6,560; Foundations in Wisconsin; \$155; Gale Courses, \$13,466; Novelist Plus, \$4,131; Novelist Select, \$3,859. Total cost: \$28,171.

Makerspace and Programming Kits:

A unique collection of makerspace and programming kits is available to member libraries in a 3-system collaboration. The collection includes makerspace and equipment from WVLS; literacy kits (board book kits, large motor skills kits, and story kits) from the IFLS Library System, and memory kits from the Northern Waters Library Service. Looking at cataloging records where costs are included, the combined cost of all materials in the collection when purchased is \$38,587 – the WVLS collection is \$20,691 for 73 items, the IFLS collection is \$7,396 for 72 items, and the NWLS is \$10,500 for 68 items.

Wisconsin Public Library Consortium (WPLC):

The WPLC member shares budget is used to provide support and funding for WPLC including such things as project management, the consortium’s website, platform fees for the Wisconsin Digital Collection, and designated funds for reserves, research and development. In 2022, the total amount of member shares was \$105,376, with \$6,586 for WVLS. \$6,586 divided by 35 locations = \$188. \$188 x 9 locations = \$1,692.

WPLC OverDrive Collection of eBooks and eAudiobooks:

This collection is available to all library cardholders in Wisconsin and is administered by the Wisconsin Public Library Consortium (WPLC). Library systems are assessed an annual fee to support this collection. The amount assessed MCPL in 2022 is reported in the Pass-Through Section later in this report.

WVLS OverDrive Advantage Collection:

Administered by WVLS with funding from WVLS, member libraries, grants and donations, the WVLS OverDrive Advantage Collection is only available to WVLS member library cardholders. This division between the state OverDrive Collection and the WVLS OverDrive Collection is invisible to users who are logged into Overdrive. This collection has received \$69,402 in donations and offers 30,319 unique e-book and e-audio titles.

F. Youth Services

WVLS provides member libraries with access to expertise and consulting to assist them in planning, developing, and evaluating youth and young adult services. **There is no charge to member libraries for services provided in this category.**

Services	WVLS		MCPL	
	Receipts	Expense	Benefit	Expense
Consult on Youth Services Matters	\$ -	\$ -	\$ -	\$ -
Summer Library Performer Grants	\$ -	\$ (2,160)	\$ 2,160	\$ -
	\$ -	\$ (2,160)	\$ 2,160	\$ -

Consult on Youth Services Matters: WVLS attends DPI-sponsored Youth Services Consultants meetings and serves on the Connecting Wisconsin Libraries: Public and School Library Collaborations Committee on behalf of its members; hosts virtual and in-person group discussion opportunities; plans webinars and workshops; maintains a system-wide movie licensing agreement to enable discounted public performance movie programming; collaborates with IFLS Library System Youth Services Consultant to provide monthly Starred Reviews for youth materials; maintains a WVLS Youth Services Information Exchange (YSIE) Facebook page and WVLS Youth Services email listserv for librarians serving youth to ask questions of and share advice with their peers; assists in the development of coding and STEM/STEAM/STREAM programs for children and teens; provides scholarships to support professional development of librarians who serve youth; shares grant

opportunities; consults on design of literacy spaces; and assists with program development and designing marketing materials.

Summer Library Performer Grants: WVLS provides a \$240 grant to each member library location to subsidize a performer for a summer program. MCPL receives a grant for each of its 9 locations x \$240 = \$2,160. In 2023, the grant to member libraries will increase to \$300.

G. Inclusive Services

In partnership with NWLS, WVLS provides its member libraries with access to expertise and consulting to assist them in planning, developing, and evaluating inclusive services, guided by “*What Does it Mean to Be Inclusive?*” - a statement from the Division for Libraries and Technology and DPI’s Inclusive Services Assessment and Guide. The Inclusive Services Consultant attends DPI-sponsored Inclusive Services Consultants meetings and serves on a team of library system consultants named “The IDEA (Inclusion, Diversity, and Equity in Action) Team.” Its purpose is to facilitate and organize statewide professional learning on topics related to diversity, equity, and inclusion for Wisconsin library staff. The WVLS consultant also ensures that additional continuing education and training opportunities are offered to member libraries. **There is no charge to member libraries for services provided in this category.**

Services	WVLS		MCPL	
	Receipts	Expense	Benefit	Expense
Consult on Inclusive Services Matters	\$ -	\$ -	\$ -	\$ -

H. Other Types of Libraries

WVLS engages with nonpublic libraries in the system area resulting in agreements with K-12, academic and special libraries for the appropriate sharing of library resources to benefit the clientele of all libraries in the system area. Activities include hosting multitype Library Advisory Committee meetings, maintaining a WVLS K-12 email list, serving on the Connecting Wisconsin Libraries: Public and School Library Collaborations Committee, acting as interlibrary loan clearinghouse for those school and academic libraries that use WISCAT, and partnering with all types of libraries to provide workshop, training, discussion, and resource sharing opportunities. **There is no charge to member libraries for services provided in this category.**

Services	WVLS		MCPL	
	Receipts	Expense	Benefit	Expense
Engage with Other Types of Libraries	\$ -	\$ -	\$ -	\$ -

I. Library Technology

WVLS is a co-founder of the Libraries and Enterprise Applications Nexus of Wisconsin (LEANWI). This multi-system resource-sharing partnership leverages the principles of scale and resource deduplication to achieve greater operational efficiency and effectiveness than any partner is capable of independently. The collective tech team expertise enables partnering systems to experience a wider breadth of skills and adds depth to core and frontline operational support. Public libraries within LEANWI partner library systems benefit from a robust network and computing infrastructure serving over 100 libraries across 25 counties at a fraction of the cost.

As a system member benefit (no cost), consultation and strategic planning services are available to all WVLS member libraries. WVLS does not charge for these consultation services irrespective of consultation time.

Services	WVLS		MCPL	
	Receipts	Expense	Benefit	Expense
Libraries Win Custom Core Services	\$ 6,900	\$ (8,580)	\$ 8,580	\$ (6,900)
Technology Support Assistance	\$ -	\$ -	\$ -	\$ -
	\$ 6,900	\$ (8,580)	\$ 8,580	\$ (6,900)

Libraries Win Custom Core Services:

Libraries Win Core Services includes wide area network (WAN) infrastructure maintenance and support required for ILS network access and licensing for standards based centralized computer security and management services. WAN infrastructure maintenance and support includes Local Area Networking (LAN) equipment at member libraries and aggregation resources at the LEANWI datacenter hosted at the Chippewa Valley Technical College’s Regional Data Center in Eau Claire. Licensing is inclusive of the primary centralized services utilized by member libraries for public or staff PCs: Deep Freeze, Antivirus, Session Management, Print Management, PC Updates Maintenance and Management, Microsoft Office, Active Directory services, File Server and Data Backup services, Website Hosting and Development services, PC and Peripherals Procurement and Support services, and more.

MCPL and several other public libraries in WVLS historically managed much of their own independent networking, server, and computer environments. WVLS continued to support this model for MCPL in 2022, reducing the base main and branch site cost shares to \$6,900 to support WAN maintenance and removing the per-PC software licensing cost sharing component. WVLS will continue to support this model for MCPL through 2023 as well. All other WVLS members have adopted the full services model including those which still self-host some server services or self-mange varying degrees of local technology management and support.

Technology Support Assistance:

Of the available services in the full Libraries Win model listed above, technology support may be the most valuable overall as it encompasses all the other services. WVLS has been increasing guarantees of support for libraries utilizing core services and reducing support for custom needs or use of non-standard networking and computer resources. WVLS does not expressly track support time provided per library over time, but utilizing the help desk system to estimate, approximately 68 hours of non-consultation, non-ILS specific, computer and networking technical support hours were provided to MCPL in 2022 at no additional cost.

J. Resource Sharing / ILS Administration

Administering the V-Cat Program includes developing and monitoring an annual budget; managing the database; providing training opportunities; offering library profile customization services; and planning and hosting meetings of the V-Cat Council, V-Cat Bibliographic Control and Interface Committee, Cooperative Circulation Committee and V-Cat Migration Committee.

It also requires active engagement in two collaborative projects, the 8-system Cooperative Cataloging Project and Joint ILS Consortium Exploration Project with the Northern Waters Library Service. With funding from 2022 LSTA Improved Discovery Solutions Grants, these projects have potential to improve V-Cat processes and services offered to member libraries.

Additional responsibilities include ongoing research of new technologies and implementing enhancements to the automated system that benefit area library staff and patrons; ongoing investigation of organizational structures and funding mechanisms of other ILS consortia for optimized practices and governance; ongoing exploration of collaborative options with other systems to improve ILS services and support; ensuring members have access to reports to assist with managing their patron, collection, and bibliographic data; assessing and evaluating member libraries’ satisfaction with ILS support, the online catalog and discovery products, and training opportunities; conducting user surveys to evaluate effectiveness of V-Cat from the user’s perspective and to support continuous improvement of V-Cat; and monitoring unmediated interloan among member libraries.

Services	WVLS		MCPL	
	Receipts	Expense	Benefit	Expense
Administer V-Cat (ILS) Services				
Administrative Support	\$ 26,802	\$ (38,289)	\$ 38,289	\$ (26,802)
Application Services Framework	\$ 41,480	\$ (41,480)	\$ 41,480	\$ (41,480)
Other ILS Project Expenses	\$ 2,400	\$ (2,400)	\$ 2,400	\$ (2,400)
ILS Enhancement/Migration/Replacement	\$ -	\$ -	\$ -	\$ -
Materials Sharing	\$ -	\$ -	\$ -	\$ -
	\$ 70,682	\$ (82,169)	\$ 82,169	\$ (70,682)

Administer V-Cat (ILS) Services:

Maintenance fees for V-Cat are based on each library’s percentage of items owned and circulations relative to the total items owned and circulations at V-Cat member libraries. Calculations use metrics from the most recent full calendar year (for example, library data from 2020 was used to determine each library’s share of the 2022 maintenance fee). MCPL’s 2022 rounded percentage was 31.91% (\$70,682) of the total \$221,525 V-Cat maintenance cost.

ILS Administrative Support

In 2022 V-Cat member libraries supported \$84,000 of \$120,000 in ILS administration support costs. WVLS provided \$36,000 in ILS administration support. Using MCPL’s 2022 percentage this adds \$11,487 to the benefit for MCPL. Using MCPL’s 2022 percentage, MCPL’s share of ILS administration support is \$26,802. MCPL benefits realized from ILS administration and support services provided by a team of experts are undeniably greater than the percent that MCPL supports with their V-Cat Maintenance share.

ILS Application Services Framework: WVLS member libraries generally benefit from lower overhead by operating in a shared services consortium and from a reduction in cost shares directly related to V-Cat's relatively low cost per unit of service. This is a result of WVLS' aggressive and effective negotiations for major service contracts. In 2022 the primary ILS application and platform services along with 3rd party contracted services totaled \$130,000. MCPL's cost share of the application services was \$41,480 and is safely considered a minimum cost offsetting benefit.

Other ILS Project Expenses:

Other ILS project expenses including training, supplies, and membership fees total \$7,525. MCPL's 2022 percentage of these costs is \$2,400.

ILS Enhancement/Migration/Replacement:

WVLS stewards approximately \$450,000 in ILS enhancement, migration, and/or replacement funds for the V-Cat Council. Though the various direct and indirect benefits realized over time from collaborative management of these resources are not easily quantified, it should be noted that WVLS and V-Cat leadership have developed a strategic position of fiscal strength which significantly empowers the consortium and system during negotiations for regular maintenance and services terms. New major project expenses including one-time upgrade/migration expenses would generally be shared by members using the same V-Cat maintenance formula. Such expenses are covered by the ILS Special Projects and ILS Migration/Replacement funds first thus these funds represent a standing tangible benefit of V-Cat Membership, portions of which may be realized in any given year. MCPL's share of this benefit by 2022 formula is approximately \$143,500.

Materials Sharing; Net Lending/Net Borrowing:

MCPL benefits from membership in V-Cat by receiving materials from other V-Cat libraries. In 2021, MCPL library users received approximately 1.6 items from other V-Cat libraries for every one item loaned to users of other V-Cat libraries. In 2021 MCPL circulation of items received from other V-Cat libraries was 68,583, and circulation of items sent to other V-Cat libraries was 42,881.

K. Administration

WVLS comprises the strongest, most productive, and expansive leadership team among Wisconsin Public Library Systems. Our service capacity and quality are products of cohesive relationships formed with other high-quality leading professionals in partner and collaborator institutions.

- The WVLS leadership team is highly engaged with the Wisconsin Library community.
- The WVLS leadership has built a robust professional resource network spanning many other systems and extending beyond Wisconsin boundaries.
- WVLS offers a comprehensive range of services greater than any library system in Wisconsin has the capacity to achieve in isolation.

WVLS has modeled its regional leadership on the guiding principle that no library or system of libraries prospers as an island unto itself. With a strong sense of responsibility to serve our diverse communities, WVLS provides innovative and impactful leadership and empowers libraries in their pursuit of excellence. The WVLS team is constantly challenged to critically assess our system services and suggest improvements, identify new resources needed to implement those improvements, make programs that are working well even better, and think outside the box to inspire our member libraries.

To address needs, roll out new services, and improve existing ones, WVLS builds incredible cohorts of professionals with similar goals. WVLS values the leadership of our collaborators. Some of the collaborative efforts initiated by WVLS leadership include the LEAN WI Technology Partnership, Shared Makerspace Collection, State Marketing Cohort, Wisconsin Trustee Training Week, Wild Wisconsin Winter Web Conference, and Libraries Activating Workforce Development Skills (LAWDS) Project Outreach. Recently, WVLS engaged with a network of ILS cataloging experts to share information and ideas to improve service and support facets within ILS management.

In addition, WVLS prioritizes attendance at system directors and consultants hosted by the Department of Public Instruction, attending state and national conferences, and maintaining a network of library colleagues across the nation to stay abreast of system and library service trends. WVLS has representation on COLAND (Council for Libraries and Network Development), WLA’s Library Development and Legislation Committee, SRLAAW (System and Resource Library Administrators Association of Wisconsin), and SOMBAAW (System Office Managers and Business Administrators Association of Wisconsin). In 2023, a WVLS staff member will serve as Chair of the 2023 WLA Fall Conference.

Services	WVLS		MCPL	
	Receipts	Expense	Benefit	Expense
Operated in Accordance with				
Chapter 43 of Wisconsin Statutes	\$ -	\$ -	\$ -	\$ -
Participate in PLSR Project	\$ -	\$ -	\$ -	\$ -
County Appropriation	\$ 18,727	\$ -	\$ -	\$ (18,727)
Rent for Office Space	\$ -	\$ (42,153)	\$ 42,153	\$ -
	\$ 18,727	\$ (42,153)	\$ 42,153	\$ (18,727)

Operates in Accordance with Chapter 43 of Wisconsin Statutes: Aid to WVLS is contingent DPI’s review of the WVLS annual plan of service, which details the system’s goals for services required in Chapter 43 in the coming year; the system annual report that itemizes WVLS’s accomplishments on the annual plan goals for the previous year; and annual financial audit which details WVLS’ fiscal activities in the most recent fiscal year completed.

Continue to Participate in Statewide PLSR Project: WVLS continues to be active participants in processes spearheaded by DPI. Most recently, in a collaborative partnership brought forth through needs addressed during the Public Library System Redesign (PLSR) process, the DPI Library Services Team and the Wisconsin Public Library Systems announced a new Wisconsin Libraries Professional Learning Calendar. Hosted by DPI using the Team Up platform and curated by the Public Library Systems, the calendar gathers learning events from Wisconsin library systems, associations, DPI Library Services, and other groups all in one public place. Public library staff and trustees are now able to find relevant profession learning without searching multiple calendars and websites.

WVLS also attends meetings with the DPI Library Services Team and other Wisconsin Public Library Systems to discuss recommendations for efficient and affordable courier services that were developed during the PLSR process.

WVLS and the Northern Waters Library Service are engaged in a comprehensive joint exploration project to determine the value and feasibility of a merger between our two Integrated Library Systems and respective ILS consortia. The PLSR process and final recommendations supported the creation of larger units of service and

pooling of resources to benefit sharing of resources, generating economies of scale, and developing depth and breadth of support and services available to member libraries.

County Appropriation: In 2022, appropriations from member counties to WVLS totaled \$41,185. This amount represents approximately 2.70% of WVLS revenue not including funds received through state and federal grants.

According to Wis. Statutes 43.15(4)(b)(2), a county may participate in a federated public library system if it provides the financial support for library services required by the plan of library service for the county [Wis. Statutes 43.11(3) and 43.13(1)}. WVLS has been able to keep flat the amount of support Marathon County provides, \$18,726, with no increases since 2011.

Rent for Office Space: WVLS has cohabited with Marathon County Public Library since its inception in 1961 as a federally funded pilot project to prove that reference service could be provided over a large rural area using one resource library. This report does not quantify the benefits of proximate access to consultants and service supporting personnel, but it does quantify the measurable rental income benefit. WVLS rents 2,594 square feet of office space at \$16.25/square foot and paid MCPL \$42,153 for rent in 2022.

Pass-through Charges to MCPL

To ensure all expenses recorded from MCPL to WVLS in 2022 are accounted for, this report includes the list of direct Pass-through transactions for which MCPL reimbursed WVLS for invoices WVLS had paid on MCPL’s behalf. As these are direct pass-through transactions, the benefits realized by MCPL are reported as exact offsets to each line item’s expense for a neutral overall net balance. The values in this table are for the sake of completeness of expense information and are not reflected in the totals mentioned in the Findings summary at the beginning of this report.

Services	WVLS		MCPL	
	Receipts	Expense	Benefit	Expense
Cases of Paper	\$ 1,580	\$ (1,580)	\$ 1,580	\$ (1,580)
Barcodes	\$ 438	\$ (438)	\$ 438	\$ (438)
E-Commerce	\$ 17,695	\$ (17,695)	\$ 17,695	\$ (17,695)
MCPL Staff Day	\$ 763	\$ (763)	\$ 763	\$ (763)
WPLC OverDrive Collection	\$ 29,506	\$ (29,506)	\$ 29,506	\$ (29,506)
	\$ 48,402	\$ (48,402)	\$ 48,402	\$ (48,402)

APPENDIX F: Letter to Marathon County Board of Supervisors



November 8, 2022

Dear Marathon County Board of Supervisors,

I am writing to you as the Director of the Wisconsin Valley Library Service (WVLS), a 7-county regional public library network that operates under Wisconsin Statute to facilitate cooperation among our 25 member libraries, including the Marathon County Public Library. WVLS advocates for resource sharing and cost-effective use of available funds and assists libraries in implementing and utilizing current and evolving technologies to ensure optimal library service to residents throughout northcentral Wisconsin. My WVLS experience as reference librarian, public library consultant, and Director spans nearly 40 years and includes supporting the Marathon County Public Library's service goals as the area resource library. I am also a lifelong resident of Marathon County. My husband and I raised three children here, and my siblings – one sister and two brothers – have families and own businesses here.

Today, I am asking you to fully support the Marathon County Public Library's 2023 budget request as approved by the MCPL Board in September and presented to the Marathon County Finance Committee in October.

The library provides a tremendous return for each taxpayer dollar invested. County residents of all ages and backgrounds, life-long learners and students, are users of the library. They count on the library to provide them with educational and recreational resources. Our neighbors and their families use it to not only access materials in the library's collection, but also for informative programs, homework help, Internet searching, wireless access and technology support, resume and job-seeking assistance, digital content, early literacy support, and research assistance in such areas as genealogy, business development and scholarship opportunities. The library's services are robust, and their staff are intelligent, professional, caring, and diligent in their service to the community.

MCPL's nine locations, particularly those in rural settings, are community anchors. They provide vital technology and broadband access, are a hub of activities and programs for young and old, and a welcoming place to find information, learn, and socialize with others.

In recent months, Marathon County citizens, including a few County Supervisors, have expressed concerns regarding certain titles in the library's collection. In line with standard public library best practices, MCPL welcomes thoughtful community conversations and has library board approved policies and procedures for both collection development and reconsideration of materials. While attending the September and October MCPL Board meetings, I have found it disconcerting to hear County Supervisors comment on the potential for library budget cuts as a way to pressure for the removal of library

materials rather than let thorough vetting of those materials take place through the established library reconsideration process.

I also fail to understand what will be accomplished by disinvesting in the public library. Defunding the library as a method to remove a few specific titles from the collection is reactionary and short-sighted and has potential for far greater harm to county residents than any perceived greater good. A library without sufficient funds to maintain its collection effectively bans every item that cannot be added to the shelf – whether purchasing new or replacement titles - any one of which might be deemed controversial or helpful by any library user at any time.

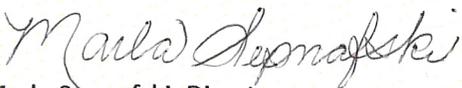
As MCPL is already operating under very tight budget constraints blasting its capital improvement fund and/or nickel and diming its operational budget will have an impact on the library's ability to excel. I anticipate that a significant reduction in county support could lead to difficult library board discussions and decisions – not only about collection development, but also regarding reductions to library service hours at one or more library sites, a reduction/elimination of library staff who either directly serve the public or work behind the scenes in support roles, or closure of one or more branches.

Per Wis. Statute 43.16, MCPL also serves as the resource library for the 7-county Wisconsin Valley Library Service area. The 24 public libraries in Clark, Forest, Langlade, Lincoln, Oneida and Taylor Counties view MCPL as a valued partner and collaborator. Its collection offers a depth and breadth of materials that benefit Marathon County residents and all northcentral Wisconsin residents alike. The leadership and support provided by MCPL staff to their colleagues in neighboring libraries has been invaluable. Their engagement in WVLS strategic planning has helped to make our regional library network one of the most efficient and effective in the state. Defunding the resource library will sabotage a 60-year investment into a vigorous regional resource sharing consortium and collaborative efforts to provide the best library services possible to citizens in small, rural communities as well as larger municipalities across this library network.

I recognize and appreciate that you, as county leaders, are making a number of incredibly challenging decisions right now, and that allocating Marathon County tax dollars in the most impactful and efficient way possible is a daunting task. As you think about how best to support county services and allocate resources in the 2023 budget, I urge you to think broadly and impartially about the benefits that the nine library sites provide to all residents across Marathon County, and to do all you can to protect and preserve funding for the Marathon County Public Library.

Thank you.

Respectfully,



Marla Sepnafski, Director

WISCONSIN VALLEY LIBRARY SERVICE

MARATHON COUNTY PUBLIC LIBRARY



welcoming, accessible, relevant, innovative



Welcoming

MCPL is open to all. The library connects people in Marathon County with the information they need, the stories they want, and resources their community provides.



Relevant

MCPL provides high-speed internet access in rural communities, and accurate database information to job seekers, businesses, genealogists, realtors, mechanics, students and parents.



Accessible

MCPL offers many access points for services: homebound delivery, digital library access 24/7, drive-up windows, plus assistance by phone, online chat, email, or in person.



Innovative

MCPL leads the annual Central Wisconsin Book Festival with a committee of literary groups and library partners across central Wisconsin.

Reading Readiness

The free MCPL program LENA Start helps build strong families using interactive technology to support parents as their Pre-K child's first teachers.



MARATHON COUNTY PUBLIC LIBRARY

expertise, collection, collaborative, resources



Expertise

MCPL staff share knowledge in cataloging, collection development, marketing, and readers' advisory with 24 partner libraries.



Resources

MCPL and partner libraries mutually benefit by leveraging their collective size to achieve increased economies of scale in purchase negotiations.



Collection

MCPL owns one third of the materials in the regional catalog. Items are shared with member libraries via a WVLS delivery service.



Collaborative

MCPL staff chair two committees and provide leadership while serving on all WVLS consortium committees and workgroups.

Wisconsin Valley Library Service 7-County Library Consortium

