Waukesha County
Library Services Plan
2017-2021

Recommended for Adoption
to the Waukesha County Board of Supervisors
by the Waukesha County Library Planning Committee

March 30, 2017

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Transmittal Letter

County Board of Supervisors
Waukesha County Courthouse
515 W. Moreland Blvd.
Waukesha, WI   53188

Dear County Board Supervisors:

In August 2016, County Board Chair Paul Decker appointed a seventeen member Library Planning Committee pursuant to the provisions of Wisconsin Act 150, now Wisconsin Statute 43.11. The statute calls upon counties to appoint periodic planning committees to consider library service issues and develop a plan of service. Counties must have current library service plans as a requirement for library system affiliation. It has been an honor to chair this committee. Eight meetings were held between August 4, 2016 and March 30, 2017, when we approved the enclosed plan for your consideration. The committee unanimously recommends that the County Board accept this plan for the period 2017 to 2021.

Particular attention should be paid to several of our recommendations:

- In 2000, Waukesha County established standards for libraries whose municipalities wish to be exempt from the county library tax. The county library standards were reviewed as a part of the current planning process and comprehensive changes in requirements have been incorporated into this five-year plan.

- The Committee, after thorough examination of all options, recommends the continued use of the regional library system to coordinate county library services.

- The Committee endorses a change to the distribution formula for Waukesha County library reimbursement that better tracks and credits the sharing of items among libraries.

- The Committee recommends a language change in the ordinance to reflect the statutory authority of the regional library system board.

- The Committee supports establishing a new county fund to incentivize finding efficiencies and reduce expenses on an ongoing basis at individual county libraries.

My sincere gratitude and thanks go to the members of the Act 150 Waukesha County Library Planning Committee for their cooperation and commitment to this endeavor. I hope that the County Board and the residents of Waukesha County appreciate the committee's efforts, and that our recommendations will advance this most important public service – our local libraries.

Sincerely,

Dave DeAngelis, Chair of the Act 150 Library Planning Committee

Waukesha County Library Planning Committee

Committee Members

Paula Bailey (Citizen, City of New Berlin)
Vicki Braden (Pauline Haass/Sussex Public Library Trustee)
Dave Cox (Village of Hartland, local official)
Dave DeAngelis (Village of Elm Grove, local official)
Diane Gard (City of Oconomowoc, local official)
Larry Hopwood (Citizen, Town of Lisbon)
Pete Loeffel (Library Director, Muskego Public Library)
Grant Lynch (Library Director, Waukesha Public Library)
Karen McNelly (Citizen, Town of Mukwonago)
Bill Mitchell (Waukesha County Board)
Dale Noll (Pewaukee Public Library Trustee)
Betty Scanlon (Bridges Library System Trustee)
Edell Schaefer (Library Director, Brookfield Public Library)
Cheryl Schoenhaar (Library Director, Town Hall (North Lake/Town of Merton) Library)
Andrea Shrednick (Citizen, City of Delafield)
Jeremy Walz (Waukesha County Board)
Nancy Wilhelm (Alice Baker (Eagle) Library Trustee)

Advisory Participants

Connie Meyer, Bridges Library System Director
Steve Trimborn, Waukesha County Senior Financial Analyst
Meg Henke, Bridges Library System Administrative Specialist
Mellanie Mercier, Bridges Library System Assistant Director/Automation Coordinator
Kathy Klager, Pauline Haass Public Library Director (standards subcommittee member)
Karol Kennedy, Menomonee Falls Public Library Director (standards subcommittee member)

Executive Summary

The Waukesha County Library Planning Committee recommends the following five-year plan that will encourage public libraries in the county to seek the path of excellence in serving their patrons. The world has changed a great deal in the past decade and libraries have been on the forefront of adapting to that change and reinventing themselves for the benefit of their communities. The success of that constant change is evident in the continued high use of libraries in this county. While the libraries in Waukesha County are all fully autonomous and governed by local library boards, they benefit greatly by their collaborative efforts such as the CAFÉ automation consortium. The citizens receive the benefit of strong, locally supported libraries without the undue burden that exists when one institution has the sole responsibility of providing all services and materials to meet its own community's needs. The vast body of information that exists in today's world is difficult to comprehend but libraries working cooperatively can leverage their resources and offer important access to their citizens. Libraries must work together to efficiently and effectively tackle the challenges they face resulting from limited funding and the changing landscape of technology.

While the public library was conceived in an age of information scarcity, today's networked world is one of information abundance and mobility. The spread of powerful digital information and communication technologies has touched every aspect of daily life, creating new opportunities. The Internet has become the critical gateway for accessing information, job opportunities, education, financial and government services, healthcare resources and civic participation. But this new world of "information plenty" creates the need for new essential skills, such as the ability to gain value from information and produce new knowledge. Access to digital networks and the development of digital literacy skills are essential for full participation in modern society. Economic, educational, civic and social opportunities are tied to a whole new set of knowledge and skills that barely existed a generation ago, and people without these skills or access to this information abundance are quickly left behind. The public library can be at the center of these changes: a trusted community resource and an essential platform for learning, creativity and innovation in the community. Public libraries have the DNA needed to thrive in this new information-rich, knowledge-based society. Providing access and connecting knowledge to the needs of individuals and the community have always been at the center of the mission and purpose of libraries. The emerging value proposition of the public library is built around three key assets - **people, place and platform** - and the ability to scale in a world of knowledge and negotiate the complicated world of knowledge and social networks. [1]

The mission of Waukesha County government is to promote the health, safety and quality of life of citizens while fostering an economically vibrant community. The county is committed to delivering effective, high quality programs and services in a courteous and fiscally prudent manner. Waukesha County recognizes that strong local libraries are essential to the quality of life for its citizens and help build strong, vibrant communities.

This county library planning process considered the past, analyzed the current environment, and then looked forward in order to identify the key strategic library issues of the next five years. This plan recommends the following:

- ❖ An update of standards to reflect the current Waukesha County library environment and to include requirements based on a graduated population scale.

- ❖ The addition of new quality assurance standards to help ensure libraries' excellence.

- ❖ A change in language to emphasize the fact that the county library standards should not be perceived as aspirational in nature. The term "minimums to exempt" more accurately describes their purpose.

- ❖ A change in the library distribution formula to more accurately credit libraries for sharing their materials.

- ❖ The removal or revision of outdated language in the county library formula distribution ordinance, in order to acknowledge the statutory authority vested in the regional library system board.

- ❖ The establishment of a new county library fund that would provide incentive to libraries to seek long-term efficiencies that benefit citizens by improving libraries and by yielding a positive return on investment.

- ❖ An outline of the new relationship between the county and the regional library system resulting from becoming a multi-county library system in 2016.

- ❖ The inclusion of a provision that a new planning process will take place if state level changes result in a reduced ability of the regional library system to meet the needs of the county and libraries.

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[1]*Rising to the Challenge: Re-Envisioning Public Libraries*. The Aspen Institute, 2014.

Introduction

Chapter 43 of the Wisconsin Statutes establishes the state's policy regarding public libraries. Because Chapter 43 outlines certain responsibilities for counties in relation to library services, it is important to note that the statute emphasizes:

- ❖ The importance of providing all of Wisconsin residents free access to knowledge, information, and diversity of ideas;

- ❖ The critical role played by public, school, special, and academic libraries in providing that access;

- ❖ The major educational, cultural, and economic asset that is represented in the collective knowledge and information resources at the libraries in Wisconsin; and

- ❖ The most efficient and effective management of Wisconsin's library resources occurs through resource sharing and collaboration.

Vision

Strong Libraries Build Strong Communities.

Waukesha County citizens enjoy a high quality of life within our strong communities. We are served by a vibrant system of well-managed, accessible and connected libraries that are the anchor of our communities. By providing access to a vast body of information, technical resources and innovative high quality programming, our communities can discover, create, learn, share and grow thereby improving the well-being of the individual and the community.

Mission Statement and Core Values

Waukesha County is committed to supporting and strengthening high quality library services to its citizens through county libraries through county funding that offers a return on investment for the taxpayers. Additionally, the County relies on a state-funded regional library system to offer critical services and resources to Waukesha County libraries; all partners are committed to operating with these core values:

- ❖ *Excellence*
- ❖ *Customer service*
- ❖ *Fiscal responsibility*
- ❖ *Collaboration*
- ❖ *Integrity*
- ❖ *Innovation*

Statutory Requirements

Chapter 43.11 specifically addresses the requirements for county library planning. While library service plans can address any appropriate issues, Wisconsin Statutes Section 43.11 requires that counties address **at least** the following in their county library plan:

❖ How public library service will be provided to residents of those municipalities in the county not maintaining a public library (locally referred to as **T**rue **N**on-**R**esidents or **TNR**);
❖ The method and level of funding that will be provided by the county in order to implement services described in the plan, including the reimbursement of municipal libraries for providing library service to in-county and adjacent county residents; and
❖ A method for allocating membership on the regional library system board between the counties in the regional library system.

A county library planning committee was appointed by Paul Decker, Chair of the Waukesha County Board, in the summer of 2016 to develop a new county library plan. A public hearing will be held to seek input on this plan and it will be presented to the Waukesha County Board of Supervisors for approval. The intention of this plan is to supersede the *Waukesha County Library Service Plan: 2012-2014*.

Planning History

Four county library plans have been approved in Waukesha County since the adoption of the 1998 Act 150 that changed Wisconsin library law requiring county library planning.

2001-2003 Plan

County Board Chair James Dwyer appointed the first Act 150 Committee, chaired by Karen McNelly. It met from September 1999 to March 2000. The committee made 15 recommendations. The main recommendations were:

- Retain the current federated status of the library system;
- Adopt a formula for collecting funds by a special county levy on the residents of the 19 communities without their own libraries;
- Adopt a formula for distribution of this funding to 16 county libraries;
- Adopt standards for library services;
- Study a shared automation system for county libraries; and
- Create a capital costs study committee.

The County Executive vetoed the standards provision but the standards were re-introduced with a modification and passed by the County Board in 2001, for 2002 budget purposes.

2004-2006 Plan

County Board Chair James Dwyer appointed the second Act 150 Committee, chaired by Ken Herro. It met from September 2002 to March 2003. The committee made 15 recommendations. The main recommendations were:

- Retain the current federated status of the library system;
- Freeze the standards implementation schedule while state tax caps are in place. Lacking the freeze, the standards would have risen to the 90% level but were frozen at the 85%;
- Require any proposed new library to demonstrate that it can and will meet the standards established for Waukesha County before it is eligible for exemption from the county library levy;
- Retain the "Best Fit" formula for distributing to libraries the funds that are collected by a special county levy on the residents of the communities without their own libraries;
- Create a shared automation system for county libraries; and
- Create a capital costs study committee.

In August of 2003, the County Board approved a Capital Cost Study Committee. The County Board approved the capital costs proposal but County Executive Finley vetoed it and the County Board sustained the veto.

2007-2011 Plan

County Board Chair James Dwyer appointed the third Act 150 Committee, chaired by Paul Kanter. It met from September 2005 to March 2006. The committee made 15 recommendations. The main recommendations were:

- Continue the standards implementation freeze;
- Establish a committee to review the formula for distribution of funds to county libraries;

- Encourage the CAFÉ Council to evaluate the effectiveness of the CAFÉ shared automation system and share the results with the WCFLS (Waukesha County Federated Library System) Board;
- Encourage the strengthening and improving of one automation system shared by all libraries in the county; and
- Defer consideration of WCFLS' organizational form, local autonomy statement and library establishment until after the final result of the Library Governance Options report.

The committee reconvened in the fall of 2006 for consideration of these issues after the conclusion of the Library Governance Options Study. Major recommendations were:

- Remain a federated library system;
- Reaffirm local library autonomy;
- Establish a capital cost reimbursement program as included in the Act 150 report; and
- Adopt a provision for payments to libraries in adjacent counties as required in newly enacted state law 43.12(2), also known as Act 420.

In August of 2007, the County Board approved the resulting Capital Costs proposal but County Executive Vrakas vetoed it and the County Board sustained the veto.

2008 - County Library Funding Committee

The County Board adopted the *Waukesha County Library Services Plan (2007-2011)* in June of 2006. It called for a re-examination of the then-current "Best-Fit" funding distribution formula in ordinance (11-4) that had been in place since 2000. The plan recommended that the County Board appoint a committee, chaired by County Supervisor Bill Mitchell. The Committee met from January 2008 to April 2008. The committee considered nine options, and its recommendations were:

- Implement a new formula for funding year 2009. The County Board agreed and passed an ordinance to this effect in June of 2008; and
- Appoint a new committee in three years to review the formula again for 2012 funding.

County Board Chair James Dwyer appointed the fourth Act 150 Committee, chaired by Richard Brandt. It met from March to June of 2011. The main recommendations of the committee were:

- Conduct at least two local library-planning efforts each year of the plan;
- Annually produce reports on member library services based on Wisconsin Library Service Record data that indicate the performance of libraries;
- Publicize successes through the media and continue to apply for awards;
- Remain a federated library system;
- Continue to use the adopted funding formula set forth in the ordinance;
- Continue to use the standards at 85% of the basic level on the voluntary standards published by the State of Wisconsin in the year 2000;
- Continue to offer the Library Service Effort ratio targets unchanged;
- Require that any new library demonstrate that it can and will meet standards before it is eligible for exemption from the county library levy; and
- Reaffirm local autonomy with library system oversight on library system compliance.

County Profile

Understanding the trends in the population of Waukesha County provides the background for planning. The 2010 Census showed the following in Waukesha County:

- Approximately 389,891 people reside in Waukesha County, making it the third most populated county in the state;
- Waukesha County population projections indicate an increase by 3.1% every five years;
- The median age is 42 years old;
- The median age will continue to increase, reflecting the aging of "baby-boomers" coupled with the smaller number of people born in the late 1960s and early 1970s;
- There are an estimated 152,663 households--70% of them are family households with both a father and mother;
- Approximately 8% of the population is disabled;
- Minority population grew - with the Hispanic/Latino population increasing by 11,000 new residents between 1990 and 2010. Almost 10% of the population in the county is a minority;
- Median household income is the highest of any county in the state; and
- The poverty rate is 5% of county residents.

County Library Services Profile

There are sixteen public libraries in the county providing library services (shown in Appendix C) to residents of Waukesha County. A resident may visit any of these public libraries to seek information, materials, and services. The sixteen libraries are located throughout Waukesha County.

Figure 1. Waukesha County Libraries
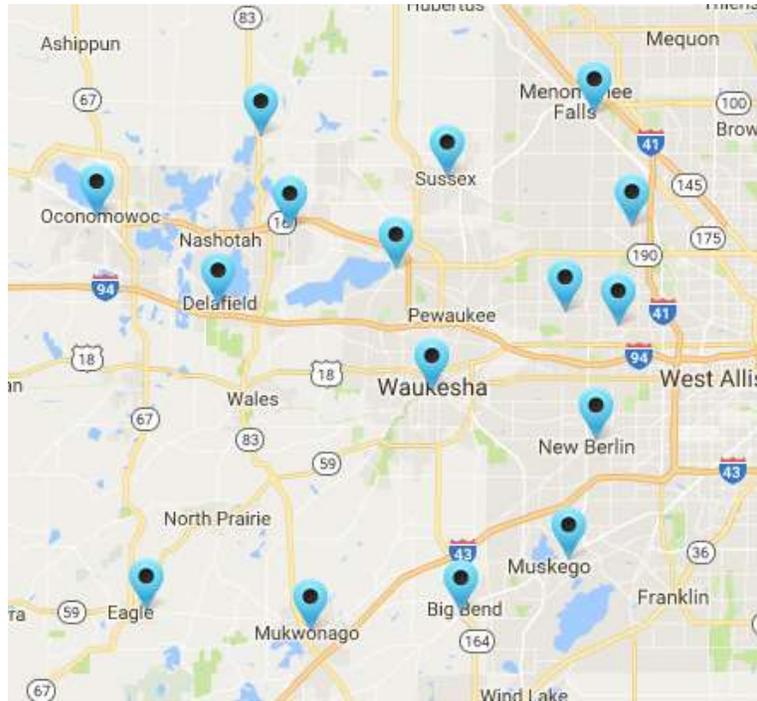
Big Bend Village Library	Brookfield Public Library	Butler Public Library	Delafield Public Library
Alice Baker Memorial Library (Eagle)	Elm Grove Public Library	Hartland Public Library	Menomonee Falls Public Library
Mukwonago Community Library	Muskego Public Library	New Berlin Public Library	Town Hall Public Library (North Lake)
Oconomowoc Public Library	Pewaukee Public Library	Pauline Haass Public Library (Sussex)	Waukesha Public Library

All Waukesha County residents who live in municipalities without libraries have access to the same services as residents of municipalities with libraries, as a condition of those libraries' membership in the regional public library system.

The municipal libraries were created under the authority of Section 43.52 of the Wisconsin Statutes by their respective municipalities and are governed by duly appointed library boards. The Pewaukee Public Library is a joint library between the Village and City of Pewaukee. The Alice Baker Library is a joint library between the Town and Village of Eagle. Each of the other libraries in Waukesha County is operated by a single municipality. All public library boards must include the local school district superintendent, or his/her designee, as a member. In addition, one member of the municipal governing body may be appointed to the library board, and up to two members may be non-residents of the municipality.

Waukesha County does not own/operate a public library. Instead, through its annual budget process, it reimburses existing libraries for providing services to residents of those municipalities that do not have libraries of their own. The county has authority to appoint members to local municipal library boards in proportion to their level of funding as set forth in Section 43.60 of Wisconsin Statutes. Waukesha County does take advantage of making appointments when allowed by statute to ensure that it has a voice on a local library board it is helping fund. For example, of the 11 trustees of the Pauline Haass Public Library in Sussex, four are Waukesha County appointees.

Regional Public Library Systems

Regional public library systems operate according to Wisconsin Statutes 43.13-43.24 and have been in place in Wisconsin since 1971. The goal of library systems is to provide all Wisconsin residents with access to high-quality library service needed to meet personal, work, educational, and community goals. The actual organization and development of public library systems in Wisconsin was a voluntary and gradual process. No county or public library is required to be a member of a library system, yet all of Wisconsin's 72 counties and 381 public libraries are library system members. The creation of public library systems fostered the establishment of a strong network of resource sharing and mutually beneficial interdependence among community public libraries. Wisconsin's 16 public library systems developed in distinct ways in response to the needs of their member libraries and area residents. They continue to evolve and respond as changes in society, resources, and technology create new demands and opportunities, including in Waukesha County.

The Waukesha County Federated Library System (WCFLS) was formed in 1981 and operated as a single county library system until 2016. On January 1, 2016, Waukesha and Jefferson Counties joined to form the Bridges Library System. You can learn more about the project, which won two prestigious awards from the Public Policy Forum, here: https://youtu.be/PaTzBU1vSdo. The award for data-driven management or decision-making highlights the thoughtfulness behind the decision to join the two counties. The project

included analysis of the following: overall cost/benefit, fiscal impact, impact on libraries, staff impact, office space capacity, delivery capacity and needs, governance changes, board member allocation, operational changes, contracts review, geographic considerations, CAFÉ operations and migration project implementation, wide area network changes and implementation, name change, and website change. The award for intergovernmental cooperation underscores the importance of working together to become stronger and the concept that to be truly successful all partners must realize added value and meaningful benefits.

Currently, regional library system services include management of the shared automation system (CAFÉ), database management, materials delivery service, professional development opportunities and resources, consulting services, special needs and youth services, marketing services, website hosting, cooperative purchasing, provision of digital and online resources, provision of backup reference services, and wide area network management.

Planning Process

County Board Chairman, Paul Decker, appointed a 17-member committee to undertake this most recent Waukesha County library planning effort. The group met from August, 2016 until March 30, 2017. Eight meetings were held during this planning process. Additionally, two subcommittee meetings were held to discuss changes to the standards including a change of nomenclature whereby "*Standard*" would be changed to "*Minimum to Exempt*."

Library input was solicited and received throughout the process and a number of library director discussions were held at the monthly library directors' meetings.

Public hearings were held to receive public input on the plan prior to approval by the Act 150 County Library Planning Committee and adoption by the County Board of Supervisors.

This plan contains recommended revisions to the county's mandatory library standards for exemption to the county library tax. Mandatory standards shall take effect if they are approved by the County Board of Supervisors and the public library boards of at least 50% of the participating municipalities in the county that contain, according to the most recent estimate prepared under Wisconsin state statute 16.96, at least 80% of the population of participating municipalities in the county. If the standards are not approved in accordance with the requirements set forth in the statute, the old standards will stay in place. This plan will remain in effect regardless of the approval of new standards since the mandatory standards are not a state required element of a county library plan.

Key Strategic Issues

1. Excellence

2. Type of Organization

3. County Funding Collection Formula

4. County Funding Distribution Formula

5. Required Standards: Minimums to Exempt from the County Library Tax

6. Library Establishment

7. Relationships with Others

8. CAFÉ Shared Automation System

9. Library Efficiency Improvements

10. Regional Library System Membership and Services

Strategic Issue #1. Excellence

Waukesha County seeks to lead the way in terms of levels and types of library services as measured by state and national data. Analyzing how Waukesha County compares to other comparable counties is important because it provides valuable context that takes into consideration what is happening in library services from a high level perspective.

Historic metrics are in the process of change. State and national data reporting agencies have begun to collect additional data that can be used to measure service delivery in the changing library landscape. In Wisconsin, digital content is owned collectively statewide with public libraries and library systems financing access through license purchases. While digital collections (and their usage) are being counted, all participating members own the digital collections. This shared ownership complicates a traditional analysis of a library collection because numbers no longer reflect single libraries. For example, the Big Bend Village Library reports on its state annual report that it owns 150,022 e-books, as does the Waukesha Public Library because both libraries have access to the Wisconsin Digital Library. In a state without a shared buying pool, the number of e-books owned by any given library would likely be a much smaller number.

It is also difficult to compare Waukesha County with other areas in the United States because the libraries' governance structure, the local conditions and/or the population are dissimilar. However, there are some counties that were considered close enough to make comparisons with the Waukesha County libraries. Figure 2 shows a listing of the comparison counties and their populations.

Figure 2. Comparison county populations – 2014 data

County	Population	Rank in Population
Santa Barbara, CA	440,668	1
Cameron Co, TX	420,392	2
Berks Co, PA	413,691	3

County	Population	Rank in Population
Hillsborough Co, NH	405,184	4
Waukesha Co, WI	395,118	5
Clackamas Co, OR	394,972	6
Orange Co, NY	376,099	24
Westmoreland Co, PA	359,320	30

In preparing the information for the chart in Figure 3, it was noted that the states representing the 8 counties in Figure 2 do not collect all of the same data. Figure 3 shows the available library data for eight comparable counties in the United States based on 2014 data. Please note the following definitions:

❖ **FTE** stands for Full-Time Equivalent Employees indicated in library staffing levels;
❖ **Circulation** refers to the number of physical items checked out of libraries as opposed to items downloaded through library-sponsored websites; and
❖ **Visits** to libraries are recorded by attendance at the libraries, often by door counters.

Figure 3. National Data for comparable county populations – 2014 Data

Service Measures	Waukesha County Actual 2014	Average of 8 Counties 2014	Waukesha Co. Rank among 8 Counties Shown in Figure 2
Expenditure/capita	44.93	30.36	2
Circulation per visit	2.27	1.49	2
Circulation per capita	12.69	7.14	2
Reference questions/capita	0.92	0.62	2
Materials expenditures/capita	4.29	2.56	1
Circulation per open hour	103.23	67.97	2
Visits/capita	5.59	4.54	1
FTE per 1000 population	0.59	0.4	1
Expenditure/circulation	3.54	5.05	6

The national data indicates that while Waukesha County is one of the higher spenders per capita, residents use library services at a much higher rate compared to the other counties. For example, Waukesha County residents are the second highest library users in terms of library visits per capita, items out per visit, and reference questions asked.   Waukesha County expenditures per checkout are among the lowest of its peer group.

Comparing state data is generally more helpful because the underlying conditions are much more similar. Historically, the 16 libraries in Waukesha County have outranked many of their state peers on important library performance measures based on state library data. Figure 4 provides Waukesha County information and rankings compared to those of the 13 most

populous counties in Wisconsin, using the most recent data available and comparing it to data from 2009, which was used in the last county library plan six years earlier.

As seen in Figure 4, on all measures but two, Waukesha County has either stayed at the same rank or improved its state ranking. The two measures where Waukesha County libraries experienced a decrease in ranking were expenditure/circulation and public internet computers/1000 population. The expenditure per circulation is moving in a positive direction as libraries have become more efficient. And the internet computers per 1,000 population service measure is likely due to more residents preferring to use the libraries' Wi-Fi networks or to bring their own devices.

It is important to note that while the Waukesha County libraries consistently lead the way based on statewide benchmarks, there has been a decrease in five of the nine historical performance benchmarks. If you look at the measures, they correspond to a shift in the way libraries are used. For example, the circulation of traditional print materials has declined but there has been an increase in digital circulation, which has not been measured until recently.

Figure 4. Waukesha County Library Data Compared to Other WI Counties (2015 Actual and % Change from 2009)

Service Measure	Waukesha Co. Actual 2015	Avg. Annual Change in 6 years	13 Counties* Avg. in 2015	Avg. Annual Change 6 years	Waukesha Co. Rank of 13 Counties	Rank 6 Years Ago
Per Capita $ - Local	$44.87	0.4%	$35.00	-2.3%	4	7
Per Capita $ - County	$38.65	1.3%	$31.40	-1.0%	2	2
Per Capita $ - Combined	$43.48	0.5%	$38.26	-0.4%	3	3
Circulation per visit	2.2	-4.0%	2.3	3.7%	5	6
Circulation per capita	11.6	-4.9%	9.73	-3.2%	4	4
Reference questions/capita	0.91	-6.8%	0.68	-4.3%	2	5
Materials expenditures/capita	5.74	0.2%	4.38	-0.7%	2	3
Circulation per open hour	94.1	-8.2%	82.3	-3.4%	3	5
Visits/capita	5.27	-1.2%	4.7	-4.4%	4	4
FTE per 1000 population	0.59	2.4%	0.51	-1.2%	5	5
Expenditure/circulation	3.97	8.4%	4.3	3.5%	8	7
Public Internet Computers per 1,000 pop	1.03	8.0%	0.93	4.0%	6	5

*13 Comparison Counties: Brown, Dane, Kenosha, La Crosse, Marathon, Milwaukee, Outagamie, Racine, Rock, Sheboygan, Washington, Waukesha, and Winnebago

Because a high quality of life for the citizens of Waukesha County, as described in the vision statement, cannot be achieved without excellent libraries, it is important that libraries be measured against performance metrics. Excellence is a moving target and the measurements will need to change in the future because of the vast changes in our information systems and society. Work is being done on a national level to devise additional outcome measures that better reflect libraries' changing role in society.

Goals and Action Steps for Strategic Issue #1 - Excellence

Goal: Produce reports that indicate performance of Waukesha County libraries using traditional and new metrics.

Objective: The library system staff, in cooperation with the county library directors, will establish new performance measures that include digital services and any other metric(s) that quantify current library service programs.

Objective: The library system staff will annually provide a report to each library board in Waukesha County that compares its library to comparable libraries.

Objective: The library system staff will annually provide to the regional library system board a report on the performance of the Waukesha County libraries in aggregate.

Objective: The library system staff will annually provide a snapshot of key performance indicators in the Waukesha County library budget request.

Strategic Issue #2. Type of Organization

In 2005, the library system hired a consulting firm to take a comprehensive look at the type of organization for the delivery of library services in Waukesha County to ascertain whether a move from a federated to a consolidated structure was advisable. The recommendation of the report was that the existing county library structure continue. The existing structure is that autonomous municipal libraries come together under the umbrella of the library system to work together to achieve efficiencies and strength of collaboration thereby improving effectiveness for all libraries and improving library services for all the citizens of Waukesha County. Even though the study was completed more than ten years ago and libraries have fundamentally changed in that time, the underlying concepts that were examined have changed little. The most significant changes are as follows:

- ❖ There are now only two joint libraries in the county since the Pauline Haass Public Library has returned to being a single municipal (village of Sussex) library again;
- ❖ The district library legislation under discussion at the time of the study has not been enacted and shows no signs of being re-introduced;
- ❖ The library system has become a two-county regional library system; and
- ❖ All of the county libraries are now a part of the CAFÉ automation consortium.

The current county library planning committee discussed the type of organization and confirmed that remaining in a federated library system arrangement is desirable. The option to change to a consolidated county library was discussed and is not recommended for the reasons cited in the previous study. The committee recommends that the statutorily required county library planning be completed by a county library planning committee as has been done in the

past. Creating another layer of government by forming a county library service, such as exists in Dane County, is not recommended as long as the current regional library system conditions remain. The option to utilize the services of the regional library system in county library planning, budgeting, compliance, and development was considered the best way to maximize efficiencies and build on expertise and relationships already in place.

Goals and Objectives for Strategic Issue #2 - Type of Organization

Goal: Continue to utilize the services of the regional library system to assist with county library planning, budgeting, compliance and development throughout the plan.

Objective: The regional library system staff will monitor the statewide PLSR project and provide feedback to PLSR expressing the need to provide a high level of county library services to avoid creating a need for an additional organization to handle county library responsibilities in the future.

Objective: Should the PLSR process change the regional library system's ability to provide effective services for the county and libraries, as determined by the library system board or the member libraries, a county library planning committee will be convened to study and plan for county-level services to benefit the county and the libraries.

Strategic Issue #3. County Funding Collection Formula

Like all Wisconsin library budgets, Waukesha County municipal library budgets are built on a patchwork of funding sources. County funding is a significant source of funding to libraries that, as required by state law, serve a large number of residents living in municipalities without libraries. Act 150 introduced a requirement in state statute that sets forth a minimum rate at which counties must tax communities without their own libraries for their residents' library use. Waukesha County ordinance 11-4 sets requirements beyond the minimum required in state law. The ordinance can be found at the following link: https://tinyurl.com/waukeshalibraryordinance.

The county library tax allows for exemption by library communities, if the community's tax for its library appropriation meets or exceeds the county library tax mill rate from the prior year or, in the case of a joint library, must not be less than the average of the previous three years. The community's library must also meet or exceed the adopted county library standards authorized by state statute and codified as enrolled Waukesha County Ordinance 11-6. To date, all municipalities with libraries have exempted themselves from the county library tax annually.

The county library planning committee reviewed the current county library collection formula as defined in Ordinance 11-4 and recommends its continuation without change. Funding from Waukesha County municipalities without their own libraries continues to be determined by multiplying the percentage of total library circulation, countywide, that is to non-library community residents by the total allowable operating expenditures of all the county libraries. *Allowable expenditures* are defined as budgeted operating expenditures (not capital) in the year prior to funding adjusted by overages or lapses in two years prior to the funding year.

The committee discussed, and recommends continuing to use circulation of physical materials as the basis for the formula because it remains the most accurate measure of library usage by place of residence. As such, the measure easily allows the computation of the ratio of library use by residents of non-library and library municipalities.

Figure 5. Non-Resident (TNR) Usage of Libraries in Waukesha County (2015 data)

Library	Circulation to TNR		Total County Circulation		TNR Ratio
Big Bend	3,872	divided by	12,345	=	31.36%
Brookfield	43,011	divided by	646,568	=	6.65%
Butler	431	divided by	28,529	=	1.51%
Delafield	144,561	divided by	252,822	=	57.18%
Eagle	5,926	divided by	44,011	=	13.46%
Elm Grove	881	divided by	96,753	=	0.91%
Hartland	47,337	divided by	185,714	=	25.49%
Menomonee Falls	7,164	divided by	314,630	=	2.28%
Mukwonago	129,741	divided by	252,909	=	51.30%
Muskego	10,205	divided by	244,498	=	4.17%
New Berlin	9,007	divided by	341,631	=	2.64%
North Lake	14,296	divided by	68,745	=	20.80%
Oconomowoc	77,836	divided by	221,416	=	35.15%
Pewaukee	33,135	divided by	300,580	=	11.02%
Sussex	102,062	divided by	294,475	=	34.66%
Waukesha	199,341	divided by	1,042,550	=	19.12%
Totals	**828,806**	divided by	**4,348,176**	=	**19.06%**

Figure 6. County Library Allowable Operating Costs 2015 for 2017 Budget

Library	Allowable Costs for 2017
Big Bend	$71,769
Brookfield	$2,853,807
Butler	$111,004
Delafield	$725,650
Eagle	$236,202
Elm Grove	$479,757
Hartland	$709,782
Menomonee Falls	$1,665,931
Mukwonago	$983,644
Muskego	$1,261,598
New Berlin	$1,482,286
North Lake	$499,448
Oconomowoc	$1,122,255
Pewaukee	$1,096,754
Sussex	$1,127,173
Waukesha	$3,971,918
Total Allowable Costs	**$18,398,978**

Figure 7. Collection Formula for 2017 Budget

Collection Formula		TNR%	x	Allowable Costs	=	In-County Budget Request
Countywide Totals		19.06%	x	$18,398,978	=	$3,507,030

During the county library planning committee's review of the collection formula there was discussion that municipalities make all the capital investments in the libraries and there is no provision in the county library collection formula to offset any of the capital expenditures. The history of the county funding formula and previous significant efforts to include a capital component in the formula were discussed. The committee does not recommend change to the current collection formula but does acknowledge that the municipalities are making additional investments well beyond the operating costs to ensure that quality library facilities are available for use by all county residents. This is especially true for those municipalities in Figure 5 with high TNR ratios, because their facilities must be sized to accommodate that use.

In addition to using county libraries, some Waukesha County residents use out-of-county libraries. Most citizens choose to use libraries that are convenient to their home, workplace, or school, irrespective of geographic/tax boundaries. Sometimes that library is across a county line. Wisconsin Act 420 was enacted in chapter 43.12 to require reimbursements across county lines. This law allows libraries to invoice an adjacent county when residents of a non-library community in that county borrow items from libraries across county borders. This provision is often known as "Cross County Payments" or "Inter-County Funding." Libraries receive

reimbursements based solely on the number of physical items checked out to the non-library community residents. Libraries must be paid at a rate of 70% of their operating costs based on actual usage. The Waukesha County library planning committee strongly supports cross county payments at this level or higher as a fair and efficient way to extend library services across county lines. It is far less expensive to reimburse an existing library than to build and operate a new library. Several libraries in Waukesha County are situated in close proximity to one or more borders, and provide significant services to citizens who live in areas without libraries in adjacent counties. Waukesha County libraries receive funding from those adjacent counties that is, in some cases, vital to their ongoing operations.

In 2017, the Waukesha County budget amount for inter-county funding was $10,722. That amount was added to the county library budget request in accordance to ss.43.12, and paid to libraries in adjacent counties. By way of comparison, Waukesha County libraries received $410,585 (in 2014) in funding from adjacent counties. As a result, it is in the interest of Waukesha County to vigorously protect the funding put in place with Act 420.

Goals and Objectives for Strategic Issue #3 - County Funding Collection Formula

Goal: Continue to collect data and make budget requests based on the formula set forth in Ordinance 11-4, state law, and pre-existing contracts.

Objective: The regional library system staff will annually review and verify all adjacent county library requests and incorporate reimbursements to non-county libraries into the county library budget request.

Objective: The regional library system staff will annually review a contract with Lakeshores Library System that compensates Waukesha County libraries for cross-county usage and incorporate both revenues and expenditures in the county library budget as well as seek the approval of the contract from the regional library system board.

Objective: The regional library system staff will annually review all library allowable costs information and circulation data and prepare county library budget request based on certified data.

Objective: The regional library system will annually prepare the municipal exemption notices and certification for compliance and report to the county the municipalities that qualify for the exemption from the county library tax.

Goal: Support the continuance of cross-county payments in Wisconsin.

Objective: The regional library system staff will monitor, inform stakeholders, and be proactively engaged in legislative efforts to ensure that cross-county payments to libraries continue at the same level or be increased.

Strategic Issue #4. County Funding Distribution Formula

The county library planning committee discussed in detail the formula prescribed in Waukesha County Ordinance 11-8. The details of the formula may be found here: https://tinyurl.com/waukeshalibraryordinance.

Wis. Statute 43.12 requires that the county set the method and level of county library service funding, which must include reimbursement to public libraries for services to county residents of municipalities that do not maintain a public library.   In Waukesha County, this is referred to as *True Non-Resident borrowing* (TNR). According to the statute, each library must receive a reimbursement of at least 70% of the local unit cost for its TNR circulations.

TNR borrowing is distinguished from *Crossover Borrowing*, which refers to residents of a library community going to another community's library. Crossover borrowing results in free services to some library communities and uncompensated services to others. The circulation adjustments in the current formula as described in the ordinance allow for net crossover lenders to be partially rewarded and for net crossover borrowing libraries to have their circulation amounts partially reduced to compensate the net lenders.

In the formula, a library is given credit for sharing its materials with other libraries. Sharing allows libraries to achieve local savings and reduces unnecessary duplication. To discourage libraries from relying too heavily on other libraries by not purchasing enough to meet local demand and to compensate libraries which build strong collections that are borrowed by residents of other library communities, interlibrary loan traffic is measured and factored into the distribution formula. How much a library sends versus how much the library borrows is netted and included as an element in the formula. The county library planning committee discussed the measurement for interlibrary loan traffic and is recommending an administrative change in the distribution formula. Instead of measuring the number of items transferred from one library to another (transits), the actual number of circulations of inter-library loan items within Waukesha County is being recommended as the data element to be used. Because the automation system now offers enough detailed reporting on the number of uses and ownership of materials at each library, this data can be recorded and used to more accurately measure a library's efforts to share with its partner libraries. Detailed information that showed the use of each library's materials for 2016 was analyzed and the committee recommends this change to offer the most accurate reflection of the data that gives credit to libraries that collect and share their materials. Additionally, the committee recommends that data for Jefferson County be collected and reported for the purposes of possible future inclusion.

To provide stability in funding, there is a safety net built into the formula that prevents any library from a decrease greater than 5% or $5,000 (whichever is less), based on the change from the prior year levy distribution unless there is a funding shortfall as described in section 11-8 (5). The county library planning committee discussed the stability component in the

formula and considered adjustments, but declined to make any changes. The libraries find it valuable to have a safety net that provides funding stability.

Finally, the language in the ordinance that commits library system reserve funds to offset potential county library funding shortfalls in section 11-8 (c) numbers 5. and 6. and 11-8 (d) is recommended for removal. It was discussed by the county library planning committee and considered to be inappropriate language in light of the fact that there is a separate governmental entity solely responsible for making decisions about its own reserve fund.

Goals and Objectives for Strategic Issue #4 – County Funding Distribution Formula

Goal: Continue to fund the libraries in accordance with the statute and the county ordinance while making changes to the ordinance as recommended by the committee: an administrative adjustment to the inter-library loan data being used, and removal or revision of language that requires the regional library system to fund a county library tax deficit.

Objective: The regional library system will compile the data for the previous year's inter-library loan circulation data and, beginning in 2017, include Waukesha County information within the distribution formula spreadsheet and Jefferson County inter-library loan information at the end of the spreadsheet for the purpose of analysis only.

Objective: Upon adoption of the county library plan, the regional library system will request a change to the ordinance to remove section 11-8 (6) and reword sections 11-8 (c) numbers 5. and 6. So that they appropriately indicate that the regional library system board has the authority for its own reserve fund.

Strategic Issue #5. Standards

The first Act 150 Committee recommended in 2000 that the county establish standards for libraries based on the state library standards. The purposes were to ensure that all county residents had access to at least a basic level of library service and to diminish the level of crossover borrowing (use by residents of one community at another community's library) by doing so. In 2001, the Waukesha County Board adopted changes to Chapter 11 of the County Code of Ordinances based on the recommendations of the Act 150 Committee. The library standards in place since 2001 reflect a rate of 85% of the basic level of the state numbers on the following four standards: staffing level, hours of service, collection size, and materials expenditures.

In addition to the standards adopted, a Library Service Effort Ratio (LSER) was approved and is described in Section 11-5 of the County Code. The LSER allows libraries an alternative method of meeting requirements. A library community that does not meet its numerical standards can

still claim exemption from the county library levy if it meets the LSER. The LSER is calculated by adding number of item loans by a library to its own residents to the number of item loans to residents of other library communities and then dividing that sum by the total number of items borrowed by the residents of that municipality at all libraries in the county.   The LSER allows library communities to retain exemption from the county library levy if their residents do most of their library business at home. According to the county plan, if most of a library's residents, most of the time, do most of their library business locally, the numerical standards will not apply. This is because residents will not be imposing any undue burden on neighboring libraries.

- ❖ A ratio below 100% indicates that the community's residents are disproportionately borrowing materials from libraries other than their own, and
- ❖ A ratio over 100% indicates that the library is a net lending community.

Because larger libraries are assumed to be better able to address the needs of their own residents, population based LSER targets were developed. The population categories and target ratios are indicated in Figure 8.

Figure 8. LSER Target Ratios

Population	Target Ratio
Under 10,000	80%
10,000 to 29,999	90%
30,000 and over	95%

The county library planning committee recommends that the LSER option for exemption be maintained without change.

The county library planning committee focused a great deal of its attention on county library standards. Because the current library standards have not been updated in nearly twenty years and because the plan vision is to build strong communities through strong libraries, the committee decided to recommend updating the standards as a part of this plan. A subcommittee was formed to dive into the details and report back to the committee. Libraries have changed profoundly in the last ten years and the sub-committee was charged with the task of offering relevant standards with a sliding population scale instead of a target for a population range. The sub-committee held two lengthy meetings and brought back information to the Act 150 County Library Planning Committee for consideration.

The sub-committee recommended that the word "S*tandards*" be changed to the phrase "*Minimums to Exempt*" whenever possible to reflect the fact that recommended levels are not aspirational in nature; they should be considered minimums. While the statute describes the benchmarks as *standards* in 43.11 (3) (d), in the county library plan and in conversation within Waukesha County they are better described as *Minimums to Exempt* from the county library tax as allowed in Wis. Statute 43.64 (2m).

The proposed *Minimums to Exempt* are based on population of the library municipality, rather than by service area population, since the library's municipality is the primary source of funding for libraries under the federated governance structure. Figure 9 lists the current population for each municipality.

Figure 9. Population of Waukesha County Library Municipalities, 2015 data.

Library Municipality	Population of Municipality
Big Bend	1,296
Brookfield	37,859
Butler	1,827
Delafield	7,111
Eagle	5,460
Elm Grove	5,956
Hartland	9,167
Menomonee Falls	35,928
Muskego	24,410
New Berlin	40,195
North Lake	8,402
Oconomowoc	16,464
Pewaukee	21,981
Sussex	10,743
Waukesha	71,316

After thorough review, the county library planning committee recommends a complete revision of the county library standards. The proposed *Minimums to Exempt* are no longer tied to the state library standards benchmarks. While the state is currently in the process of a major revision of the standards, the county library committee did not wish to wait for the state standards to be completed. Therefore, new benchmarks are being proposed based on an analysis of actual Waukesha County-specific data. The committee is recommending adoption of new numerical minimums, the addition of two new measures, and the inclusion of checklist items for the purpose of quality assurance. Finally, the committee recommends that the LSER option for exemption be maintained without change.

The *Minimums to Exempt* for each factor based on a sliding population scale are shown in full in Appendix A. Each library's actuals vs. the proposed *Minimums to Exempt* are shown in Appendix B.

Materials Expenditures Per Capita:

Expenditures on physical library materials, and the size of libraries' physical collections have changed as a result of the growth in the size of digital collections. Because of this shift, this existing standard was carefully examined and the minimum requirements reflect this technological change. Despite the trend toward digital, libraries still have a significant demand for physical materials. In fact, physical circulation represents an average of 93% of circulation countywide. Libraries are expected to use their annual materials budget to build a relevant current collection that is reflective of and responsive to their local community. The materials expenditures per capita *Minimum to Exempt* measure is intended to ensure that libraries meet the current needs of the community by requiring that libraries annually invest a minimum funding level for the purchase of materials, including electronic materials, as determined by materials expenditures based on the size of the municipal population. The recommended minimum benchmarks for materials expenditures per capita were thoroughly reviewed in the context of local budgets and funding constraints and are shown in Figure 10. It should be noted that the per capita expenditure amount is recommended to decrease beginning at the population level of 10,000 as seen in Figure 10. The first 9,999 of the population is calculated at the $6.00 per capita amount and the decreased rate of $5.00 per capita is calculated on the portion of the population over 9,999. Individual library requirements are shown in Appendix B.

Figure 10. Materials Per Capita Minimums to Exempt

Population	Expenditures /Capita	Materials Expenditures
1,000	$6.00	$6,000
1,500	$6.00	$9,000
2,000	$6.00	$12,000
2,500	$6.00	$15,000
3,000	$6.00	$18,000
3,500	$6.00	$21,000
4,000	$6.00	$24,000
4,500	$6.00	$27,000
5,000	$6.00	$30,000
5,500	$6.00	$33,000
6,000	$6.00	$36,000
6,500	$6.00	$39,000
7,000	$6.00	$42,000
7,500	$6.00	$45,000
8,000	$6.00	$48,000
8,500	$6.00	$51,000
9,000	$6.00	$54,000
9,500	$6.00	$57,000
10,000+	$5.00	$59,999

Hours Open:

The number of hours a library is open per week is an important factor in the level of service it is able to provide to citizens. Some libraries have reduced hours over the summer months in response to changes in community needs. Therefore, the requirement for the minimum number of hours open is represented in average hours per week during the school year. The minimums for the number of open library hours per week based on population are shown in Figure 11. Individual library requirements are shown in Appendix B.

Figure 11: Winter Hours Open/Week Minimums

Population	Hours Open/Week
1,000	35
1,500	35
2,000	35
2,500	36
3,000	38
3,500	39
4,000	40
4,500	41
5,000	43
5,500	44
6,000	45
6,500	46
7,000	48
7,500	49
8,000	50
8,500	51
9,000	53
9,500	54
10,000+	55

Full Time Staff Equivalent (FTE) – 40 hours/week) per 1,000 Population

Libraries are service-based institutions, which means having adequate staffing levels is a key input measure. For a library to effectively serve its community, the number of full-

The most important asset of any library goes home at night—the library staff.

~Rev. Timothy Healy

time equivalent (FTE) staff should be related to the size of the population. It should be noted that the *Minimums to Exempt* benchmark is based on the number of staff budgeted, not actual. This allows for unforeseen circumstances such as staff vacancies. The new FTE requirements are shown in Figure 12. The minimum number recommended is 2.0 FTE staff members regardless of the size of the library's community population. Having enough staff to handle daily operations is considered key to a library's success. The rate of the incremental increase is reduced at several population points as shown in Figure 12. An increase of 1.0 FTE is recommended for each 1,000 of population above 2,000. Economies of scale are achieved once a library reaches a certain size. Therefore, the incremental rate of increase is reduced after a population hits the 10,000 mark. At that point, the changes in staff required grow at a rate of approximately .10 per 500 population. Once a population hits the 25,000 mark, the rate of increase is further reduced. At that population point, the increases in staff required are reduced to a rate of .0095 per 500 population. The three change points are highlighted in yellow in Figure 12. The complete population table is shown in Appendix A. Individual library requirements are shown in Appendix B.

Figure 12. FTE Staffing Levels Based on Population

Population	FTE Staffing Minimum
1,000	2.00
2,000	2.00
3,000	3.00
4,000	4.00
5,000	5.00
6,000	6.00
7,000	7.00
8,000	8.00

9,000	9.00
10,000	10.00
10,500	10.10
11,000	10.20
11,500	10.31
12,000	10.41
12,500	10.51
13,000	10.62
13,500	10.73
14,000	10.84
14,500	10.94

Population	FTE Staffing Minimum
15,000	11.05
15,500	11.17
16,000	11.28
16,500	11.39
17,000	11.51
17,500	11.62
18,000	11.74
18,500	11.86
19,000	11.98
19,500	12.10
20,000	12.22
20,500	12.34
21,000	12.47
21,500	12.59
22,000	12.72
22,500	12.85

23,000	12.98
23,500	13.11
24,000	13.24
24,500	13.38
25,000	13.51
25,500	13.64
26,000	13.77
26,500	13.90
27,000	14.03
27,500	14.16
28,000	14.30
28,500	14.44
29,000	14.57
29,500	14.71
30,000	14.85
30,500	14.99
31,000	15.13
31,500	15.28

Collection Size

A library's collection size continues to matter to citizens as a majority of patrons are still seeking physical materials. As libraries transition to digital content, the size of the physical collection will likely decrease over time. The *Minimums to Exempt* may be reduced in future years. However, during the timeline of this plan, an investment in physical materials (books, DVDs, audio recordings, magazines) is still considered key to successfully meeting community needs. As shown in Figure 10, the minimum collection for a population of 2,500 or fewer is 14,000 items. At a population of 2,500 an incremental increase of 4,000 items per 500 population is recommended. At a population of 10,000, the incremental increase is reduced to 1,000 items per 500 population. At a population of 25,000 the increase is reduced to 800 items per 500 population. At a population of 50,000 the increase is reduced to 500 items per 500 population. The change points are highlighted in Figure 12 below. Individual library requirements are shown in Appendix B.

Figure 13. Collection Size Based on Population

Population	Collection Size	Population	Collection Size
1,000	14,000	19,500	93,000
1,500	14,000	20,000	94,000
2,000	14,000	20,500	95,000
2,500	14,000	21,000	96,000
3,000	18,000	21,500	97,000
3,500	22,000	22,000	98,000
4,000	26,000	22,500	99,000
4,500	30,000	23,000	100,000
5,000	34,000	23,500	101,000
5,500	38,000	24,000	102,000
6,000	42,000	24,500	103,000
6,500	46,000	25,000	104,000
7,000	50,000	25,500	104,800
7,500	54,000	26,000	105,600
8,000	58,000	26,500	106,400
8,500	62,000	27,000	107,200
9,000	66,000	27,500	108,000
9,500	70,000	28,000	108,800
10,000	74,000	28,500	109,600
10,500	75,000	29,000	110,400
11,000	76,000	29,500	111,200
11,500	77,000	30,000	112,000
12,000	78,000	30,500	112,800
12,500	79,000	31,000	113,600
13,000	80,000	31,500	114,400
13,500	81,000	32,000	115,200
14,000	82,000	32,500	116,000
14,500	83,000	33,000	116,800
15,000	84,000	33,500	117,600
15,500	85,000	34,000	118,400
16,000	86,000	34,500	119,200
16,500	87,000	35,000	120,000
17,000	88,000	35,500	120,800
17,500	89,000	36,000	121,600
18,000	90,000	36,500	122,400
18,500	91,000	37,000	123,200
19,000	92,000	37,500	124,000
		38,000	124,800

Population	Collection Size
38,500	125,600
39,000	126,400
39,500	127,200
40,000	128,000
40,500	128,800
41,000	129,600
41,500	130,400
42,000	131,200
42,500	132,000
43,000	132,800
43,500	133,600
44,000	134,400
44,500	135,200
45,000	136,000
45,500	136,800
46,000	137,600
46,500	138,400
47,000	139,200
47,500	140,000
48,000	140,800

48,500	141,600
49,000	142,400
49,500	143,200
50,000	144,000
50,500	144,500
51,000	145,000
51,500	145,500
52,000	146,000
52,500	146,500
53,000	147,000
53,500	147,500
54,000	148,000
54,500	148,500
55,000	149,000
55,500	149,500
56,000	150,000
56,500	150,500
57,000	151,000
57,500	151,500
58,000	152,000
58,500	152,500

Number of Public Internet Computers

This is a recommended **new** requirement. A minimum number of public access internet computers based on population is recommended. In today's technologically driven world, the library is the main source of public internet connectivity in the county's libraries. This role has been increasing in importance as libraries bridge the digital divide in their communities. While many Waukesha County residents bring their own devices to libraries, it is important to recognize that not all residents have equal ability to afford to do so, and to remember the library's role in equalizing access. All devices that are available to the public with internet access, such as computers, laptops, and tablets qualify in a library's count. Figure 14 shows the minimum numbers of public internet computers based on population. The minimum number of computers for any size population is 2. An increase of one computer for every 1,000 people is recommended until a library community population reaches 10,000. At that population size, the requirement is reduced to 1 computer for every 2,000 people. The requirements for all population sizes is shown in Appendix A. Individual library requirements are shown in Appendix B.

Figure 14. Public Internet Computer Requirements.

Population	Computers/Internet Devices
1,000	2
1,500	2
2,000	2
2,500	2
3,000	3
3,500	3
4,000	4
4,500	4
5,000	5
5,500	5
6,000	6
6,500	6
7,000	7
7,500	7
8,000	8
8,500	8
9,000	9
9,500	9
10,000	10
10,500	10

Population	Computers/Internet Devices
11,000	11
11,500	11
12,000	11
12,500	11
13,000	12
13,500	12
14,000	12
14,500	12
15,000	13
15,500	13
16,000	13
16,500	13
17,000	14
17,500	14
18,000	14
18,500	14
19,000	15
19,500	15
20,000	15
20,500	15
21,000	16
21,500	16
22,000	16
22,500	16

Wireless Internet Access

This is a recommended **new** requirement. Public wireless internet access is extremely important for all libraries. Many people have their own devices and rely on libraries for their connection to the internet. A new standard is recommended that requires that county libraries of all size populations offer wireless internet access as shown in Figure 15.

Figure 15. Wireless Access Requirement

Population	Wireless Access
>1	Yes

Quality Assurance Standards

In addition to the numeric *Minimums to Exempt*, a series of *Quality Assurance Standards* are being recommended. Because these items are relevant to a library serving any size population and don't include numeric benchmarks, they are proposed as checklist items. Each library board would have to respond "yes" to the requirement in order to meet the quality assurance standard. These *Quality Assurance Standards* are important because they help ensure that the libraries in the county will be well managed and accountable throughout the life of the plan. The recommended new *Quality Assurance Standards* are:

❖ Library board members receive an orientation upon appointment to a library board;
❖ The library's website includes contact information of key staff and board members as well as board agendas and minutes;
❖ The library board conducts an annual review of its library director;
❖ The library budget includes funding to ensure professional development for the library director and staff; and
❖ The library has an active strategic plan.

The recommended phase-in for implementation of the *Quality Assurance Standards* is shown in Figure 16.

Figure 16. Implementation Dates for Quality Assurance Items

Quality Assurance Item	Effective Date
Board Member Orientation	Immediately*
Website Information	Immediately*
Performance Review of Director	2018 for 2019 exemption
Budget for Professional Development	2018 for 2019 exemption
Strategic Plan in Place	2018 for 2019 exemption

*Immediately is defined as the first exemption process that occurs once the standards have been approved.

Standards Implementation

The *Quality Assurance Standards* would become effective according to the schedule in Figure 16. All the numeric standards are being recommended to take effect immediately upon adoption by the county board of supervisors and the libraries as required in Wis. State Statute 43.11(3)(d).

The plan of library services for a county may include minimum standards of operation for public libraries in the county. The county shall hold a public hearing on any standards proposed under this paragraph. The standards shall take effect if they are approved by the county and the public library boards of at least 50 percent of the participating municipalities in the county that contain, according to the most recent estimate prepared under s. 16.96, at least 80 percent of the population of participating municipalities in the county.

Libraries would be allowed a one-time exception during the county library plan cycle for each of the standards items, the numeric *Minimums to Exempt,* as well as the checklist *Quality Assurance Standards.* In other words, in one year, a library could not meet the staffing level and the planning requirements and still qualify for the county library tax exemption. However, the library would need to meet both of those requirements for the remaining four years of the plan. The following year, the library could not meet its materials expenditures requirement and still qualify for the exemption because it had not used an exception on this item in a previous year.   Additionally, any library that meets its LSER ratio (as previously described) automatically qualifies for the county library tax exemption relative to the *Minimums to Exempt* component of the requirement. Standards requirements are in addition to the library's municipal requirement to meet or exceed the county library tax.

Below are the steps established to implement the county library tax exemption based on the requirement that a municipality meet the tax levy requirement as well as the adopted *Minimums to Exempt* for its municipal population or LSER qualification for its municipal population, and meet the *Quality Assurance Standards* for all libraries.

- **February** - Libraries file state annual report indicating the necessary data for hours, staffing, materials collection size, materials spending, number of computers and wireless access for the previous year. Reports are due March 1.
- **May** – The regional library system distributes to each library a letter indicating the library's compliance with the *Minimums to Exempt* and LSER ratio based on the annual report of the previous year and the certification form approved by the library board that it intends to meet the *Minimums to Exempt* and *the Quality Assurance Standards* in the current year or provide a plan for return to compliance.
- **August** – Tax levy exemption information is distributed to libraries and municipalities in August.   Exemption and standards compliance documentation is due by September 30 each year.
- **October** – The library system communicates to the county those municipalities that have met the requirements and are eligible to be exempt from the county library tax for the following year's budget.
- **November** – Waukesha County Board of Supervisors sets the levy for the following budget year. The levy includes exemptions to the county library tax levy for communities with libraries that meet all criteria for exemption.

Goals and Objectives for Strategic Issue #5 – Standards

Goal: Revise the Waukesha County library standards to reflect the changing role of libraries, to create new minimum acceptable levels of resource inputs for library services within the county, and to provide quality assurance checks that will result in improved library services countywide.

Objective: The regional library system will seek the approval for the new *Minimums to Exempt* and *Quality Assurance Standards* at every library in Waukesha County.

Objective: The regional library system will seek the approval of the *Minimums to Exempt* and *Quality Assurance Standards* by the Waukesha County Board of Supervisors.

Goal: Monitor compliance with the Minimums to Exempt, Quality Assurance Standards, and municipal requirement to meet or exceed county library tax rate.

Objective: The regional library system will annually certify whether each library and library municipality has met its requirement to quality for the municipal exemption in the county library tax.

Strategic Issue #6. Library Establishment

There are 16 established public libraries in Waukesha County. Since 1986, our state law has required county approval for a township to establish a library or form a joint library with an existing library. However, cities and villages are not required to gain such approval. Municipalities with libraries can choose to abolish those libraries at any time, leaving county residents without library access.

State library law allows a county board to disallow a proposed library or a joint library that includes one or more towns because of the potential impact that change could have on the county library tax base. No such prohibition exists for cities and villages. They can form libraries or join with existing libraries when they see fit. During 2005, the City of Pewaukee formed a joint library with the Village of Pewaukee. The new library, established according to county standards, serves the residents well. But the establishment of the joint library caused a disruption to library funding for the remaining libraries in the county.

Therefore, it is critical that any proposed new library demonstrate that it can and will meet the county library *Minimums to Exempt* and *Quality Assurance Standards* before it is eligible for exemption from the county library tax.

Goals and Objectives for Strategic Issue #6 – Library Establishment

Goal: Monitor the county library landscape for new library establishments or partnerships so that all parties have the information needed for proper decision-making.

Objective: The regional library system will communicate information to all stakeholders about potential new libraries so that there is adequate time for all parties to respond to potential changes in funding.

Strategic Issue #7. Relationships with Others

While Act 150 and Act 420 provided much needed county funding for libraries in Wisconsin, the laws do not completely address the issue of non-resident use of municipal libraries. There are several exceptions that cause problems, especially in Waukesha County along the northern and eastern borders.

While Act 420 requires county funding for adjacent county library usage, Milwaukee County is excluded from the requirement. Because Milwaukee County does not have any non-resident areas (TNR), there are no non-libraried residents. Communities that border Milwaukee County are free to serve or not serve Milwaukee County residents based on a local library board decision. Some libraries choose to serve residents of Milwaukee County because they believe the impact to be minimal and the commitment to open access worthy of an "open door" policy. Some libraries charge fees to residents of Milwaukee County in an attempt to receive some revenue from the residents for whom they are not being reimbursed with tax dollars. Other libraries choose not to serve Milwaukee County residents because they do not wish to have their residents subsidize people who are not at least partially funding the service.

Act 420 also does not require county funding for library usage across borders in the case of two libraried communities that lie in close proximity to one another in separate counties and separate library systems. In Waukesha County, this problem is most severe in the case of the Menomonee Falls Public Library. The library is on the northeastern edge of the county, bordering Washington and Milwaukee Counties. The Menomonee Falls Public Library does not receive funding from Milwaukee County as previously described. Additionally, there are residents from the village of Germantown (a community with a library) who would use the Menomonee Falls Library if allowed to do so. Act 420 requires counties to pay for use by residents of only those communities without libraries—not communities like the Village of Germantown. The Menomonee Falls Public Library is allowed, by statute, to deny services to residents of any municipality with a library if the circulation is 500 or more. The Menomonee Falls Public Library board of trustees made the decision many years ago to deny library services to the residents of Germantown after a number of efforts to receive reimbursement failed.

Looking at the southern edge of Waukesha County, the regional library system board has a long-standing agreement in place with Lakeshores Library System that adequately addresses the cross-county borrowing issues along the southern border. That agreement is between the two regional library systems and is reviewed/approved annually. On the western border, there aren't significant issues that are not addressed by the provisions in Act 420.

Ultimately, whether a library board chooses to provide library service to citizens who are not providing any funding for that service is a local decision driven by philosophy and local circumstances. Due to the desire to maintain strong local autonomy, the committee does not recommend setting a countywide policy on whether local library service should be denied or allowed in the event of an adjacent county funding situation.

Goals and Objectives for Strategic Issue #7 – Relationships with Others

Goal: Ensure that there is dialog in areas where there are denials of library service to citizens.

Objective: The regional library system will hold an annual meeting between Menomonee Falls Library and Germantown Library to share information and discuss possible solutions.

Objective: The regional library system will track the amount of usage by Milwaukee County residents in Waukesha County and share the information with libraries.

Strategic Issue #8. CAFÉ Shared Automation System

CAFÉ (Catalog Access for Everyone) is a shared integrated library system (ILS) created for the benefit of all the libraries in the county and in the regional library system. Until 2011, CAFÉ was owned and operated by the Waukesha Public Library for 14 of the 16 county libraries. In April of 2011, the ownership and operation of CAFÉ was transferred to the regional library system. Since that time, New Berlin and Menomonee Falls have joined CAFÉ. Additionally, all of the libraries in Jefferson County joined CAFÉ when the new regional library system was formed on January 1, 2016. There are currently 24 public libraries in the CAFÉ automation consortium.

CAFÉ is a member-funded consortium. That member ownership is considered important due to its essential role in the operation of a modern library. Not only does CAFÉ offer access to the citizens to all the materials owned by all the 24 member libraries, it also provides the software for all circulation operations and related data gathering. Because CAFÉ does not rely on state funding, it is not at high risk in the event of changes to regional library systems in Wisconsin. Due to the unknown future for library systems in Wisconsin at this time, it is imperative that CAFÉ be sufficiently funded locally to ensure stability in operations and membership fees.

Goals and Objectives for Strategic Issue #8 – CAFÉ Shared Automation System

Goal: Continue to encourage CAFÉ cooperation and proper planning and funding to ensure it remains a viable option for Waukesha County libraries.

Objective: At least once during the plan, the regional library system will evaluate the effectiveness of CAFÉ from a user's perspective.

Objective: The regional library system will provide oversight for CAFÉ operations and will annually set a CAFÉ budget that includes membership fees that provide sufficient funds to allow for regular hardware and software replacement.

Objective: The regional library system will communicate, or request that member libraries communicate, the viability of CAFÉ during the PLSR process.

Strategic Issue #9. Library Efficiency Improvements

The concept of the county library tax being used to help fund local library capital costs has been studied and discussed many times over the years. The Act 150 committee discussed the concept and rejected the idea of asking Waukesha County to commit to help fund municipal library capital costs because the past efforts were considerable and the conditions have not changed enough to warrant a renewed effort. The fact that the local library communities tax their residents to provide the buildings and infrastructure that the residents who live in non-libraried areas benefit from, but do not contribute capital funding for, is likely an issue that will not be resolved in the near future. However, the fact that the county helps fund the operating costs by paying its share based on annual usage by its residents offers a valuable and essential funding partnership.

Because the county library tax is directly impacted by local libraries' operating costs, helping libraries achieve greater efficiencies is a worthwhile endeavor. The county library planning committee recommends the formation of a new Waukesha County fund to incentivize local library projects that result in long-term operational efficiencies, improved libraries, and a positive return on investment for the citizens of Waukesha County.

Goals and Objectives for Strategic Issue #9 – Library Efficiency Improvements

Goal: Encourage libraries to find operational efficiencies.

Objective: The regional library system staff will work with Waukesha County to explore the concept of establishing a fund to offer grant opportunities to the libraries of Waukesha County. The fund's annual expenditures would be considered as a part of the county's annual budget process when the projects demonstrate a long-term improvement in operational efficiencies.

Strategic Issue #10. Regional Library System Membership and Services

Waukesha County operated as a single county library system for almost 35 years--until December 31, 2015. As such, there was not separation of the county library services and the library system. In fact, all county library administrative duties have been handled by the regional library system and the regional library system board has acted as a de facto county library board. Duties and roles between the various partners were clarified as a result of adding Jefferson County to the regional library system in 2016. Waukesha County was selected to be the fiscal agent for the newly formed regional library system. The regional library system staff was charged with carrying out the duties related to county library services as requested by the counties. Regional library system board member allocation was agreed upon between Waukesha and Jefferson Counties. Per Wisconsin Statute, the allocation is based on approximate population: Waukesha County has eight seats on the library system board and Jefferson County has three seats on the library system board. The ratio is to be revisited with each census.

The merger of the two counties was successful in that it offered efficiencies that translated to reduced costs for local libraries, additional access to resources for citizens, and additional revenue in excess of expenditures that could be used to fund carefully selected strategic priorities. The success of the project was not accidental; the project took more than a year to complete and involved an analysis of impacts prior to approval as well as the actual work to bring about comprehensive organizational change. The Waukesha County libraries made clear that they needed their library system to continue to be as effective and responsive to their needs as in the past and that the additional libraries should not detract from the needed level of service. Because the regional library system has acted in the role of providing county library services, the reliance on and expectation for services is likely greater than elsewhere in Wisconsin.

A statewide Public Library System Redesign (PLSR) Project is currently underway and is studying ways library systems in Wisconsin can increase effectiveness and efficiencies. While the outcome of that study is unknown, it is safe to say that resource sharing and collaboration will certainly continue to be key elements of regional library systems now and in the future. If statewide change in library system structure creates larger regionalized service areas, there is a potential that this scenario would result in a reduced ability of the library system to provide services to and for Waukesha County libraries. A change of this nature and magnitude could drive the need to create and fund a county library service to provide services that are currently being provided by the existing regional library system. To avoid the need for an additional investment in county library services, it will be important to be engaged in the PLSR process.

Goals and Objectives for Strategic Issue #10 – Regional Library Systems

Goal: Encourage the PLSR project to focus its efforts on making recommendations that result in improvements in library system effectiveness so that Waukesha County libraries benefit from increased services and a higher level of support.

Objective: The regional library system staff will engage in the PLSR process to ensure that ideas for improvements are offered throughout the project.

Objective: The regional library system staff will engage in the PSLR process to ensure that ideas that surface that are anticipated to be detrimental to Waukesha County libraries are communicated to stakeholders in a timeframe that offers the possibility for the county, the municipalities, and the libraries to take action to influence the outcome for the benefit of Waukesha County citizens.

Plan Implementation

This county library plan will be presented for adoption to the Waukesha County Board of Supervisors upon approval by the county library planning committee. Once adopted it will be filed with the Department of Public Instruction to meet the state's county library planning requirements. A separate process will be used for the adoption of the revised county library standards. Because local library board action, in addition to county board approval, is required for library standards, that process will take additional time. In the event the county library standards are not approved (in accordance with the requirements in the statute), the current library standards will remain in place. In the event of that scenario, the county board of supervisors has the option to form a new county library planning committee or revive the past committee to review the standards and make new recommendations before the end of the adopted five-year plan.

Review of the Plan

This plan will be reviewed annually by the regional library system board. This is a five-year plan and the expectation is that a new plan will be approved prior to the expiration of this plan. In the event of a change in library systems in the state of Wisconsin that results in a change to Waukesha County's ability to rely on its regional library system for quality services, a county library planning committee will be convened to study options and create a new county library plan for consideration and approval by the Waukesha County Board of Supervisors.

Appendices

Appendix A

Minimum to Exempt for Each Service Factor Based on Population

Population	Material Expenditures	Expenditures/ Capita	Hours Open	FTE	Collection Size	Computers/ Internet Devices
1,000	$6,000	$6.00	35	2.00	14,000	2
1,500	$9,000	$6.00	35	2.00	14,000	2
2,000	$12,000	$6.00	35	2.00	14,000	2
2,500	$15,000	$6.00	36	2.00	14,000	2
3,000	$18,000	$6.00	38	3.00	18,000	3
3,500	$21,000	$6.00	39	3.00	22,000	3
4,000	$24,000	$6.00	40	4.00	26,000	4
4,500	$27,000	$6.00	41	4.00	30,000	4
5,000	$30,000	$6.00	43	5.00	34,000	5
5,500	$33,000	$6.00	44	5.00	38,000	5
6,000	$36,000	$6.00	45	6.00	42,000	6
6,500	$39,000	$6.00	46	6.00	46,000	6
7,000	$42,000	$6.00	48	7.00	50,000	7
7,500	$45,000	$6.00	49	7.00	54,000	7
8,000	$48,000	$6.00	50	8.00	58,000	8
8,500	$51,000	$6.00	51	8.00	62,000	8
9,000	$54,000	$6.00	53	9.00	66,000	9
9,500	$57,000	$6.00	54	9.00	70,000	9
10,000	$59,999	$5.00	55	10.00	74,000	10
10,500	$62,499	$5.00	55	10.10	75,000	10
11,000	$64,999	$5.00	55	10.20	76,000	11
11,500	$67,499	$5.00	55	10.31	77,000	11
12,000	$69,999	$5.00	55	10.41	78,000	11
12,500	$72,499	$5.00	55	10.51	79,000	11
13,000	$74,999	$5.00	55	10.62	80,000	12
13,500	$77,499	$5.00	55	10.73	81,000	12
14,000	$79,999	$5.00	55	10.84	82,000	12
14,500	$82,499	$5.00	55	10.94	83,000	12
15,000	$84,999	$5.00	56	11.05	84,000	13
15,500	$87,499	$5.00	56	11.17	85,000	13
16,000	$89,999	$5.00	56	11.28	86,000	13
16,500	$92,499	$5.00	56	11.39	87,000	13
17,000	$94,999	$5.00	56	11.51	88,000	14
17,500	$97,499	$5.00	56	11.62	89,000	14
18,000	$99,999	$5.00	56	11.74	90,000	14

Population	Material Expenditures	Expenditures/ Capita	Hours Open	FTE	Collection Size	Computers/ Internet Devices
18,500	$102,499	$5.00	56	11.86	91,000	14
19,000	$104,999	$5.00	56	11.98	92,000	15
19,500	$107,499	$5.00	56	12.10	93,000	15
20,000	$109,999	$5.00	57	12.22	94,000	15
20,500	$112,499	$5.00	57	12.34	95,000	15
21,000	$114,999	$5.00	57	12.47	96,000	16
21,500	$117,499	$5.00	57	12.59	97,000	16
22,000	$119,999	$5.00	57	12.72	98,000	16
22,500	$122,499	$5.00	57	12.85	99,000	16
23,000	$124,999	$5.00	57	12.98	100,000	17
23,500	$127,499	$5.00	57	13.11	101,000	17
24,000	$129,999	$5.00	57	13.24	102,000	17
24,500	$132,499	$5.00	57	13.38	103,000	17
25,000	$134,999	$5.00	58	13.51	104,000	18
25,500	$137,499	$5.00	58	13.64	104,800	18
26,000	$139,999	$5.00	58	13.77	105,600	18
26,500	$142,499	$5.00	58	13.90	106,400	18
27,000	$144,999	$5.00	58	14.03	107,200	19
27,500	$147,499	$5.00	58	14.16	108,000	19
28,000	$149,999	$5.00	58	14.30	108,800	19
28,500	$152,499	$5.00	58	14.44	109,600	19
29,000	$154,999	$5.00	58	14.57	110,400	20
29,500	$157,499	$5.00	58	14.71	111,200	20
30,000	$159,999	$5.00	59	14.85	112,000	20
30,500	$162,499	$5.00	59	14.99	112,800	20
31,000	$164,999	$5.00	59	15.13	113,600	21
31,500	$167,499	$5.00	59	15.28	114,400	21
32,000	$169,999	$5.00	59	15.42	115,200	21
32,500	$172,499	$5.00	59	15.57	116,000	21
33,000	$174,999	$5.00	59	15.72	116,800	22
33,500	$177,499	$5.00	59	15.87	117,600	22
34,000	$179,999	$5.00	59	16.02	118,400	22
34,500	$182,499	$5.00	59	16.17	119,200	22
35,000	$184,999	$5.00	60	16.32	120,000	23
35,500	$187,499	$5.00	60	16.48	120,800	23
36,000	$189,999	$5.00	60	16.63	121,600	23
36,500	$192,499	$5.00	60	16.79	122,400	23
37,000	$194,999	$5.00	60	16.95	123,200	24
37,500	$197,499	$5.00	60	17.11	124,000	24
38,000	$199,999	$5.00	60	17.28	124,800	24

Population	Material Expenditures	Expenditures/ Capita	Hours Open	FTE	Collection Size	Computers/ Internet Devices
38,500	$202,499	$5.00	60	17.44	125,600	24
39,000	$204,999	$5.00	60	17.61	126,400	25
39,500	$207,499	$5.00	60	17.77	127,200	25
40,000	$209,999	$5.00	60	17.94	128,000	25
40,500	$212,499	$5.00	60	18.11	128,800	25
41,000	$214,999	$5.00	60	18.28	129,600	26
41,500	$217,499	$5.00	60	18.46	130,400	26
42,000	$219,999	$5.00	60	18.63	131,200	26
42,500	$222,499	$5.00	60	18.81	132,000	26
43,000	$224,999	$5.00	60	18.99	132,800	27
43,500	$227,499	$5.00	60	19.17	133,600	27
44,000	$229,999	$5.00	60	19.35	134,400	27
44,500	$232,499	$5.00	60	19.54	135,200	27
45,000	$234,999	$5.00	60	19.72	136,000	28
45,500	$237,499	$5.00	60	19.91	136,800	28
46,000	$239,999	$5.00	60	20.10	137,600	28
46,500	$242,499	$5.00	60	20.29	138,400	28
47,000	$244,999	$5.00	60	20.48	139,200	29
47,500	$247,499	$5.00	60	20.68	140,000	29
48,000	$249,999	$5.00	60	20.87	140,800	29
48,500	$252,499	$5.00	60	21.07	141,600	29
49,000	$254,999	$5.00	60	21.27	142,400	30
49,500	$257,499	$5.00	60	21.47	143,200	30
50,000	$259,999	$5.00	60	21.68	144,000	30
50,500	$262,499	$5.00	60	21.88	144,500	30
51,000	$264,999	$5.00	60	22.09	145,000	31
51,500	$267,499	$5.00	60	22.30	145,500	31
52,000	$269,999	$5.00	60	22.51	146,000	31
52,500	$272,499	$5.00	60	22.73	146,500	31
53,000	$274,999	$5.00	60	22.94	147,000	32
53,500	$277,499	$5.00	60	23.16	147,500	32
54,000	$279,999	$5.00	60	23.38	148,000	32
54,500	$282,499	$5.00	60	23.60	148,500	32
55,000	$284,999	$5.00	60	23.83	149,000	33
55,500	$287,499	$5.00	60	24.05	149,500	33
56,000	$289,999	$5.00	60	24.28	150,000	33
56,500	$292,499	$5.00	60	24.51	150,500	33
57,000	$294,999	$5.00	60	24.74	151,000	34
57,500	$297,499	$5.00	60	24.98	151,500	34

Population	Material Expenditures	Expenditures/ Capita	Hours Open	FTE	Collection Size	Computers/ Internet Devices
58,000	$299,999	$5.00	60	25.22	152,000	34
58,500	$302,499	$5.00	60	25.46	152,500	34
59,000	$304,999	$5.00	60	25.70	153,000	35
59,500	$307,499	$5.00	60	25.94	153,500	35
60,000	$309,999	$5.00	60	26.19	154,000	35
60,500	$312,499	$5.00	60	26.44	154,500	35
61,000	$314,999	$5.00	60	26.69	155,000	36
61,500	$317,499	$5.00	60	26.94	155,500	36
62,000	$319,999	$5.00	60	27.20	156,000	36
62,500	$322,499	$5.00	60	27.46	156,500	36
63,000	$324,999	$5.00	60	27.72	157,000	37
63,500	$327,499	$5.00	60	27.98	157,500	37
64,000	$329,999	$5.00	60	28.25	158,000	37
64,500	$332,499	$5.00	60	28.51	158,500	37
65,000	$334,999	$5.00	60	28.79	159,000	38
65,500	$337,499	$5.00	60	29.06	159,500	38
66,000	$339,999	$5.00	60	29.34	160,000	38
66,500	$342,499	$5.00	60	29.61	160,500	38
67,000	$344,999	$5.00	60	29.90	161,000	39
67,500	$347,499	$5.00	60	30.18	161,500	39
68,000	$349,999	$5.00	60	30.47	162,000	39
68,500	$352,499	$5.00	60	30.76	162,500	39
69,000	$354,999	$5.00	60	31.05	163,000	40
69,500	$357,499	$5.00	60	31.34	163,500	40
70,000	$359,999	$5.00	60	31.64	164,000	40
70,500	$362,499	$5.00	60	31.94	164,500	40
71,000	$364,999	$5.00	60	32.24	165,000	41
71,500	$367,499	$5.00	60	32.55	165,500	41
72,000	$369,999	$5.00	60	32.86	166,000	41
72,500	$372,499	$5.00	60	33.17	166,500	41
73,000	$374,999	$5.00	60	33.49	167,000	42
73,500	$377,499	$5.00	60	33.81	167,500	42
74,000	$379,999	$5.00	60	34.13	168,000	42
74,500	$382,499	$5.00	60	34.45	168,500	42
75,000	$384,999	$5.00	60	34.78	169,000	43
75,500	$387,499	$5.00	60	35.11	169,500	43
76,000	$389,999	$5.00	60	35.44	170,000	43
76,500	$392,499	$5.00	60	35.78	170,500	43
77,000	$394,999	$5.00	60	36.12	171,000	44
77,500	$397,499	$5.00	60	36.46	171,500	44
78,000	$399,999	$5.00	60	36.81	172,000	44

Appendix B

New Minimums vs. Actuals for Waukesha County Libraries based on 2015 Data (data will be updated annually)

Library	Big Bend	Population		1,296	
		Actual Material Expenditures		$11,324	
Category		**Minimum To Exempt**		**Actual**	**Pass (Yes/No)**
$ Materials/Capita		$6.00		$8.74	YES
Hours Open		35		37	YES
FTE		2.00		1.96	NO
Collection Size		14,000		14,752	YES
Public Computers/Internet Access Devices		2		4	YES
Wireless Internet Access		Yes		Yes	Yes

Library	Brookfield	Population		37,859	
		Actual Material Expenditures		$398,088	
Category		**Minimum To Exempt**		**Actual**	**Pass (Yes/No)**
$ Materials/Capita		$5.26		$10.52	YES
Hours Open		60		67	YES
FTE		17.11		32.62	YES
Collection Size		124,000		189,941	YES
Public Computers/Internet Access Devices		24		71	YES
Wireless Internet Access		Yes		Yes	Yes

Library	Butler	Population	1,827	
		Actual Material Expenditures	$10,442	
Category		Minimum To Exempt	Actual	Pass (Yes/No)
$ Materials/Capita		$6.00	$5.72	NO
Hours Open		35	51	YES
FTE		2.00	2.46	YES
Collection Size		14,000	26,936	YES
Public Computers/Internet Access Devices		2	17	YES
Wireless Internet Access		Yes	Yes	Yes
Target Material Expenditures (If Library Does Not Pass $ Materials/Capita)		$10,962	$10,442	NO

Library	Delafield	Population	7,111	
		Actual Material Expenditures	$81,169	
Category		Minimum To Exempt	Actual	Pass (Yes/No)
$ Materials/Capita		$6.00	$11.41	YES
Hours Open		48	59	YES
FTE		7.00	9.78	YES
Collection Size		50,000	77,933	YES
Public Computers/Internet Access Devices		7	21	YES
Wireless Internet Access		Yes	Yes	Yes

Library	Eagle	Population	5,460	
		Actual Material Expenditures	$31,351	
Category		Minimum To Exempt	Actual	Pass (Yes/No)
$ Materials/Capita		$6.00	$5.74	NO
Hours Open		43	56	YES
FTE		5.00	4.87	NO
Collection Size		34,000	35,028	YES
Public Computers/Internet Access Devices		5	7	YES
Wireless Internet Access		Yes	Yes	Yes
Target Material Expenditures (If Library Does Not Pass $ Materials/Capita)		$32,760	$31,351	NO

Library	Elm Grove	Population	5,956	
		Actual Material Expenditures	$80,281	
Category		Minimum To Exempt	Actual	Pass (Yes/No)
$ Materials/Capita		$6.00	$13.48	YES
Hours Open		44	56	YES
FTE		5.00	6.51	YES
Collection Size		38,000	61,916	YES
Public Computers/Internet Access Devices		5	11	YES
Wireless Internet Access		Yes	Yes	Yes

Library	Hartland	Population	9,167	
		Actual Material Expenditures	$106,691	
Category		Minimum To Exempt	Actual	Pass (Yes/No)
$ Materials/Capita		$6.00	$11.64	YES
Hours Open		53	59	YES
FTE		9.00	10.28	YES
Collection Size		66,000	77,622	YES
Public Computers/Internet Access Devices		9	13	YES
Wireless Internet Access		Yes	Yes	Yes

Library	Menomonee Falls	Population	35,928	
		Actual Material Expenditures	$169,886	
Category		Minimum To Exempt	Actual	Pass (Yes/No)
$ Materials/Capita		$5.28	$4.73	NO
Hours Open		60	64	YES
FTE		16.48	21.45	YES
Collection Size		120,800	133,849	YES
Public Computers/Internet Access Devices		23	57	YES
Wireless Internet Access		Yes	Yes	Yes
Target Material Expenditures (If Library Does Not Pass $ Materials/Capita)		$189,639	$169,886	NO

Library	Mukwonago	Population	7,629	
		Actual Material Expenditures	$119,226	
Category		Minimum To Exempt	Actual	Pass (Yes/No)
$ Materials/Capita		$6.00	$15.63	YES
Hours Open		49	61	YES
FTE		7.00	15.41	YES
Collection Size		54,000	96,375	YES
Public Computers/Internet Access Devices		7	34	YES
Wireless Internet Access		Yes	Yes	Yes

Library	Muskego	Population	24,410	
		Actual Material Expenditures	$174,780	
Category		Minimum To Exempt	Actual	Pass (Yes/No)
$ Materials/Capita		$5.41	$7.16	YES
Hours Open		57	62	YES
FTE		13.24	14.80	YES
Collection Size		102,000	114,753	YES
Public Computers/Internet Access Devices		17	38	YES
Wireless Internet Access		Yes	Yes	Yes

Library	New Berlin	Population	40,195	
		Actual Material Expenditures	$220,347	
Category		Minimum To Exempt	Actual	Pass (Yes/No)
$ Materials/Capita		$5.25	$5.48	YES
Hours Open		60	67	YES
FTE		17.94	17.71	NO
Collection Size		128,000	149,771	YES
Public Computers/Internet Access Devices		25	34	YES
Wireless Internet Access		Yes	Yes	Yes

	Town Hall/			
Library	North Lake	Population	8,402	
		Actual Material Expenditures	$87,750	
Category		Minimum To Exempt	Actual	Pass (Yes/No)
$ Materials/Capita		$6.00	$10.44	YES
Hours Open		50	60	YES
FTE		8.00	8.15	YES
Collection Size		58,000	68,242	YES
Public Computers/Internet Access Devices		8	13	YES
Wireless Internet Access		Yes	Yes	Yes

Library	Oconomowoc	Population	16,464	
		Actual Material Expenditures	$112,431	
Category		Minimum To Exempt	Actual	Pass (Yes/No)
$ Materials/Capita		$5.61	$6.83	YES
Hours Open		56	60	YES
FTE		11.28	12.88	YES
Collection Size		86,000	118,183	YES
Public Computers/Internet Access Devices		13	15	YES
Wireless Internet Access		Yes	Yes	Yes

Library	Pewaukee	Population	21,981	
		Actual Material Expenditures	$125,382	
Category		Minimum To Exempt	Actual	Pass (Yes/No)
$ Materials/Capita		$5.45	$5.70	YES
Hours Open		57	59	YES
FTE		12.59	13.55	YES
Collection Size		97,000	110,400	YES
Public Computers/Internet Access Devices		16	20	YES
Wireless Internet Access		Yes	Yes	Yes

Library	Sussex	Population	10,743	
		Actual Material Expenditures	$108,971	
Category		Minimum To Exempt	Actual	Pass (Yes/No)
$ Materials/Capita		$5.93	$10.14	YES
Hours Open		55	59	YES
FTE		10.10	13.58	YES
Collection Size		75,000	89,431	YES
Public Computers/Internet Access Devices		10	20	YES
Wireless Internet Access		Yes	Yes	Yes

Library	Waukesha	Population	71,316	
		Actual Material Expenditures	$424,356	
Category		Minimum To Exempt	Actual	Pass (Yes/No)
$ Materials/Capita		$5.14	$5.95	YES
Hours Open		60	67	YES
FTE		32.24	44.66	YES
Collection Size		165,000	311,211	YES
Public Computers/Internet Access Devices		41	104	YES
Wireless Internet Access		Yes	Yes	Yes

Appendix C

Materials and Services Provided by Waukesha County Libraries					
	Books	**Audiobooks**	**DVDs**	**Magazines**	**Newspapers**
Big Bend	x	x	x	x	x
Brookfield	x	x	x	x	x
Butler	x	x	x	x	x
Delafield	x	x	x	x	x
Eagle	x	x	x	x	x
Elm Grove	x	x	x	x	x
Hartland	x	x	x	x	x
Menomonee Falls	x	x	x	x	x
Mukwonago	x	x	x	x	x
Muskego	x	x	x	x	x
New Berlin	x	x	x	x	x
North Lake	x	x	x	x	x
Oconomowoc	x	x	x	x	x
Pewaukee	x	x	x	x	x
Sussex	x	x	x	x	x
Waukesha	x	x	x	x	x

	Music on CD	**Internet Access**	**Wi-Fi Access**	**e-Books**	**e-Audiobooks**
Big Bend	x	x	x	x	x
Brookfield	x	x	x	x	x
Butler	x	x	x	x	x
Delafield	x	x	x	x	x
Eagle	x	x	x	x	x
Elm Grove	x	x	x	x	x
Hartland	x	x	x	x	x
Menomonee Falls	x	x	x	x	x
Mukwonago	x	x	x	x	x
Muskego	x	x	x	x	x
New Berlin	x	x	x	x	x
North Lake	x	x	x	x	x
Oconomowoc	x	x	x	x	x
Pewaukee	x	x	x	x	x
Sussex	x	x	x	x	x
Waukesha	x	x	x	x	x

Materials and Services Provided by Waukesha County Libraries					
	Digital Magazines	Online Databases	Gale Courses	Technology Assistance (one on one)	Devices for Check out
Big Bend	x	x	x	x	
Brookfield	x	x	x	x	
Butler	x	x	x	x	
Delafield	x	x	x	x	x
Eagle	x	x	x	x	x
Elm Grove	x	x	x	x	
Hartland	x	x	x	x	
Menomonee Falls	x	x	x	x	
Mukwonago	x	x	x	x	x
Muskego	x	x	x	x	x
New Berlin	x	x	x	x	
North Lake	x	x	x	x	x
Oconomowoc	x	x	x	x	
Pewaukee	x	x	x	x	
Sussex	x	x	x	x	x
Waukesha	x	x	x	x	x

	Public Copier (B&W)	Public Copier (Color)	Public Computer Printing (B&W)	Public Computer Printing (Color)	Wireless Printing
Big Bend	x	x	x	x	
Brookfield	x		x		x
Butler	x	x	x	x	
Delafield	x	x	x	x	
Eagle	x	x	x	x	x
Elm Grove	x	x	x	x	
Hartland	x	x	x	x	x
Menomonee Falls	x	x	x	x	x
Mukwonago	x	x	x	x	x
Muskego	x	x	x	x	
New Berlin	x	x	x	x	
North Lake	x	x	x	x	
Oconomowoc	x	x	x	x	
Pewaukee	x		x		x
Sussex	x	x	x	x	x
Waukesha	x	x	x	x	x

Materials and Services Provided by Waukesha County Libraries					
	Faxing Service	Public Scanner	Microfilm Reader	Local History Resources	Outreach Services
Big Bend	x			x	x
Brookfield		x	x	x	x
Butler		x		x	x
Delafield		x		x	x
Eagle	x	x		x	x
Elm Grove	x	x	x	x	x
Hartland		x	x	x	x
Menomonee Falls		x	x	x	x
Mukwonago	x	x	x	x	x
Muskego	x	x		x	x
New Berlin		x	x	x	x
North Lake	x			x	
Oconomowoc		x	x	x	x
Pewaukee				x	x
Sussex	x	x		x	x
Waukesha	x	x	x	x	x

	Programs for Children & Adults	Summer Library Program	1000 Books Before Kindergarten App	Programs for Teens	Interlibrary Loan Service
Big Bend	x	x	x	x	x
Brookfield	x	x	x	x	x
Butler	x	x	x	x	x
Delafield	x	x	x	x	x
Eagle	x	x	x	x	x
Elm Grove	x	x	x	x	x
Hartland	x	x	x	x	x
Menomonee Falls	x	x	x	x	x
Mukwonago	x	x	x	x	x
Muskego	x	x	x	x	x
New Berlin	x	x	x	x	x
North Lake	x	x	x	x	x
Oconomowoc	x	x	x	x	x
Pewaukee	x	x	x	x	x
Sussex	x	x	x	x	x

Materials and Services Provided by Waukesha County Libraries					
	Meeting Room(s)	Art Gallery	Tables & Seating	Teen Area	Exam Proctoring
Big Bend	x		x		x
Brookfield	x		x	x	x
Butler	x		x	x	x
Delafield	x		x	x	x
Eagle	x		x	x	x
Elm Grove	x		x	x	x
Hartland	x		x	x	x
Menomonee Falls	x	x	x	x	x
Mukwonago	x		x	x	x
Muskego	x		x	x	x
New Berlin	x	x	x	x	
North Lake	x	x	x	x	
Oconomowoc	x	x	x	x	x
Pewaukee	x		x	x	x
Sussex	x		x	x	x
Waukesha	x	x	x	x	x

	Reference Services	Readers Advisory	Income Tax Forms	Tax Preparation Assistance	Low Vision Reader
Big Bend	x	x	x		x
Brookfield	x	x	x	x	x
Butler	x	x	x		x
Delafield	x	x	x		x
Eagle	x	x	x		x
Elm Grove	x	x	x		x
Hartland	x	x	x		x
Menomonee Falls	x	x	x	x	x
Mukwonago	x	x	x	x	x
Muskego	x	x	x	x	x
New Berlin	x	x	x	x	x
North Lake	x	x	x		x
Oconomowoc	x	x	x		x
Pewaukee	x	x	x		x
Sussex	x	x	x	x	x
Waukesha	x	x	x		x

Materials and Services Provided by Waukesha County Libraries					
	Library Website	After-Hours Meeting Space	Job Search Info & Assistance	Friends of the Library Group	Trained Staff
Big Bend	x		x		x
Brookfield	x		x	x	x
Butler	x		x	x	x
Delafield	x		x	x	x
Eagle	x	x	x	x	x
Elm Grove	x		x	x	x
Hartland	x		x	x	x
Menomonee Falls	x		x	x	x
Mukwonago	x	x	x	x	x
Muskego	x		x	x	x
New Berlin	x		x	x	x
North Lake	x		x	x	x
Oconomowoc	x	x	x	x	x
Pewaukee	x	x	x	x	x
Sussex	x	x	x	x	x
Waukesha	x		x	x	x

	Large Print Materials	Hearing Loop	Charging Stations	Book Club Kits	Study Room(s)
Big Bend	x	x	x		x
Brookfield	x	x	x	x	x
Butler	x	x	x		x
Delafield	x	x	x		x
Eagle	x		x		
Elm Grove	x	x	x		x
Hartland	x	x	x		x
Menomonee Falls	x	x	x	x	x
Mukwonago	x	x	x	x	x
Muskego	x	x	x	x	x
New Berlin	x	x	x		x
North Lake	x	x	x		x
Oconomowoc	x	x	x		x
Pewaukee	x	x	x		x
Sussex	x	x	x		x
Waukesha	x	x	x	x	x

Materials and Services Provided by Waukesha County Libraries					
	Handicapped Accessible Building	Designated Warming/Cooling Shelter	Digitized local history	STEM Lab	Early Literacy Play Areas
Big Bend	x				
Brookfield	x		x		x
Butler	x				x
Delafield	x	x			x
Eagle	x	x			
Elm Grove	x				x
Hartland	x		x		x
Menomonee Falls	x				x
Mukwonago	x	x			x
Muskego	x				
New Berlin	x	x			x
North Lake	x				x
Oconomowoc	x	x			x
Pewaukee	x	x			
Sussex	x	x		x	x
Waukesha	x	x	x		x

Materials and Services Provided by Waukesha County Libraries					
	Makerspace Lab/3D Printer	Self-Checkout	Coffee	Homebound Delivery	Wi-Fi Hotspots for Checkout
Big Bend					
Brookfield		x		x	x
Butler					
Delafield		x	x	x	x
Eagle			x	x	x
Elm Grove				x	
Hartland			x	x	
Menomonee Falls		x		x	
Mukwonago	x	x	x	x	
Muskego		x			
New Berlin		x		x	x
North Lake					
Oconomowoc					
Pewaukee		x			
Sussex		x	x		x
Waukesha	x	x		x	x

Materials and Services Provided by Waukesha County Libraries					
	Outdoor Space	**Newsletter**	**Social Media Presence**	**Notary Services**	**Group Technology Training**
Big Bend			x		
Brookfield	x	x	x		x
Butler			x		
Delafield	x	x	x		
Eagle	x		x		
Elm Grove			x		
Hartland	x	x	x		
Menomonee Falls	x	x	x		
Mukwonago	x	x	x		
Muskego		x	x		
New Berlin	x	x	x		
North Lake			x		
Oconomowoc		x	x		
Pewaukee	x	x	x		
Sussex	x	x	x		
Waukesha		x	x	x	