

1. **Market the WVLS collections of databases, makerspace items and professional resources to members throughout the year.** RESULTS:
2. Evaluate contracts and usage for WVLS subscription-based electronic resources provided for member libraries and their patrons. RESULTS:
3. **Continue to** encourage collaborative collection development by member libraries in selected subject areas. RESULTS:

Youth Services

2023 ONGOING ACTIVITIES RELATED TO THIS REQUIREMENT:

1. Provide member libraries with access to expertise and consulting to assist them in planning, developing, and evaluating youth and young adult services. RESULTS:
 - WVLS continued its strong partnership with IFLS Youth Services Consultant to draft monthly Starred Reviews for youth materials and provide support and guidance of benefit to member libraries in both systems.
2. Partially subsidize a performer at member libraries' summer reading programs. RESULTS:
 - In September 2022, the WVLS Board of Trustees approved an increase to the 2023 Summer Library Program (SLP) grant from \$240 to \$300 that any interested member public library or branch library could receive.
 - WVLS SLP grants supported performances at 30 WVLS member library locations throughout the summer months.
 - The total 2023 SLP grant distribution was \$8,577.85.
3. Meet virtually or in-person with youth services staff from member libraries to determine grants, focus of CE workshops, and directions for future projects. **(See also Professional Learning no. 11.)** RESULTS:
 - Two virtual Youth Services Information Exchanges (YSIEs) were held in 2023. The YSIE held in January focused on collection development. A YSIE held in April discussed how to bring back focus when a program starts to go off the rails.
 - During the last half of 2023, the new WVLS Public Library Services Consultant visited all WVLS member libraries to get acquainted with library staff, see each library's public spaces, collect feedback and gather ideas for future projects and initiatives.
 - Discussion opportunities were offered during the Annual Youth Services Workshop held in November at the T.B. Scott Free Library (Merrill).
 - The next virtual YSIE will be in January 2024.
4. Assist member libraries in marketing youth and young adult activities. RESULTS:
 - Staff continued the Collaborative Summer Performer Booking worksheet as a tool for booking performers collaboratively to achieve discounted performer rates and to find new performers.
 - CSLP (Collaborative Summer Library Program) materials, including a substantial manual in web access format that included marketing tools adaptable for year-round use, were distributed to member public libraries in preparation for the 2023 summer library program.

- Assisted marketing youth programs and services by creating branding images used for websites, online calendars, and printable materials. Provided consulting services on how to create online registration forms. Provided tutorials on updating website content and website capabilities.
 - 2022 Infographics created for all of Clark County, Antigo, Gilman, and offered a template to all WVLS member libraries.
 - Libraries were reminded to routinely update youth services and program information on their websites and were provided images for regular and event programming.
 - Updates on the WVLS website "Marketing & Infographics" and "Advocacy" pages were shared with area youth services colleagues early in the year.
5. Maintain a system-wide movie licensing agreement to enable public performance movie programming for interested libraries. Conduct annual review to assess cost effectiveness and invite additional participation. RESULTS:
- WVLS negotiated a group discount on movie licenses through Swank Movie Licensing USA on behalf of interested member libraries.
 - The system-wide movie licensing agreement ran from December 2, 2022-December 1, 2023, and 17 libraries participated.
 - Libraries that purchase movie licenses were able to show commercial films at their site without worrying about liability for copyright infringement.
 - The comprehensive license provided libraries with free access to customizable movie posters, bookmarks, movie tickets, activity sheets and more to help advertise movie programs.
 - Depending on the service population of each participating library, the standard cost for a license ran between \$400-\$1,135. As a group, the cost to participating libraries dropped to \$320-\$908. Those that renewed received a deeper discount, some as low as \$235 (normally \$475).
 -
6. Host annual "dine-around gathering." This unique opportunity brings together public library youth services staff and school media specialists to discuss priorities for the WVLS youth services program. RESULTS:
- In the past, this opportunity was offered following the annual Children's Book Fest. While school and public librarians had an opportunity for informal networking at the 2023 Rhinelander Children's Book Fest on May 1 and 2, WVLS staff changes precluded fulfilling this goal as originally planned.
7. Partner with the DPI/DLT Public Library Youth and Special Services Consultant and other system youth services consultants to implement and promote early literacy and other statewide initiatives. RESULTS:
- Staff attended bi-monthly meetings with DPI and system youth and inclusive services consultants to discuss regional and state early literacy initiatives.
 - WVLS supported DPI's statewide literacy initiative by service as fiscal agent for a statewide contract for Beanstack for school libraries that will run from July 2021 – April 2023.
 - WVLS continued its strong partnership with IFLS Youth Services Consultant to draft monthly Starred Reviews for youth materials, plan and host continuing education opportunities and provide support and guidance of benefit to member libraries in both systems.
8. Facilitate collaborations on youth and young adult services. RESULTS:
- Staff maintained the WVLS Youth Services Information Exchange (YSIE) Facebook page and WVLS Youth Services email listserv. Each form of communication provided the opportunity for librarians to ask questions of, and share advice with, their peers. These communications also drove conversation topics for virtual youth services discussions.

- Staff continued the Collaborative Summer Performer Booking Worksheet as a tool for booking performers collaboratively to achieve discounted performer rates and to find new performers. A *Digital Byte* was created to promote awareness and use of this tool.
 - A Performers Showcase Directory, produced by the Youth Services Section of WLA, was shared with member libraries as a resource for program planning and cooperative program scheduling.
9. Assist member libraries in the development of coding and STEM/STEAM/STREAM programs for children and teens. RESULTS:
- A YSIE opportunity in January provided an opportunity for librarians who serve youth to brainstorm ideas for in-person, virtual, and self-directed programs, summer program activities, and Take & Make Bags to include all aspects of STEM/STEAM/STREAM.
 - The WVLS Youth Services Information Exchange (YSIE) Facebook page was maintained and updated with accessible, relevant online and offline STEM/STEAM/STREAM ideas for collections, programs, and services.
 - Grants to support STEM/STEAM/STREAM programming were announced through *Monday Mentions*, youth services communication channels, and the WVLS Youth Services Information Exchange (YSIE) Facebook page.
10. Maintain the WVLS Youth Services Information Exchange (YSIE) Facebook page to encourage the exchange of ideas and resource sharing. RESULTS:
- Youth services personnel were reminded of this resource. Those not currently participating were encouraged to join the group.
 - The WVLS YSIE Facebook page had several posts throughout the year, and area staff who serve youth were encouraged to share ideas, experiences, questions, resources, and service announcements.
 - Informal peer-to-peer question and answer posts jumpstarted topics for broader virtual youth discussions.
 - The YSIE Facebook page frequently announced upcoming workshops and youth services virtual and in-person discussions and webinars, shared WVLS and DPI youth services announcements, programming ideas, WVLS member library program features, and articles and professional resources from Wisconsin Library Association Youth Services Section (YSS)/ALSC/ALA/PLA and other professional association youth resources/experts.
11. Feature member library youth services spaces during virtual or in-person YSIE gatherings. RESULTS:
- As part of the annual WVLS Youth Services Workshop held in November, staff at the TB Scott Free Library (Merrill) provided a tour of the library's youth services space.
12. Include Youth Services Librarians in **WVLS Scholarship opportunities**. RESULTS:
- Scholarships were awarded to three colleagues to attend the Wisconsin Educational Media and Technology Association (WEMTA) Conference held February 5-7, 2023, in Rothschild, WI. Scholarships went to Kay Heiting, Granton Community Library Director and Granton Area School District Library Media Specialist; Julie Beloungy, Thorp School District; and Kristie Heistad, Youth Librarian at Antigo Public Library.
 - A scholarship was awarded to Annette Miller, Tomahawk Public Library Children's Librarian, to attend the American Library Association (ALA) Annual Conference held June 22-27, 2023, in Chicago, Illinois.
 - Several youth services librarians received scholarships to attend the Wisconsin Library Association (WLA) Annual Conference, held October 24-27, 2023, in Middleton, Wisconsin. Scholarship recipients included Andrea Bennett, T.B. Scott Free Library (Merrill); Denise Chojnacki,

Rhineland District Library; Krista Blomberg, Rib Lake Public Library; and Rita Ludvigsen, Western Taylor County Public Library (Gilman).

Indicate new or priority activities relating to this requirement for the plan year (2023).

None indicated.

Indicate new or priority activities relating to this requirement for the plan year (2024).

1. Attend the national ALSC (Association for Library Services to Children) Institute and share what is learned with youth services colleagues. Offer a scholarship for a youth services colleague to attend this event as well.

INCLUSIVE SERVICES

(K). Wis. Stats. 43.24(2)(k) Promotion and facilitation of library service to users with special needs.

2023 ONGOING ACTIVITIES RELATED TO THIS REQUIREMENT:

1. Through a partnership with Northern Waters Library Service, provide member libraries with access to expertise and consulting to assist them in planning, developing, and evaluating inclusive services, guided by *What Does it Mean to Be Inclusive? A Statement from the Division of Libraries and Technology* and the Wisconsin Department of Public Instruction's *Inclusive Services Assessment and Guide* and the **American Library Association's Accessible Communication Styles and Virtual Accessibility toolkits**. RESULTS:
 - The *Inclusive Services Assessment and Guide* was introduced to libraries during orientations for new member library staff.
 - Assistance in using this resource was made available to member libraries upon request.
2. Maintain collection of professional materials on inclusive services. RESULTS:
 - Titles on inclusivity were added to the NWLS and WVLS Professional Collections as appropriate.
 - Titles were made available to share with Wisconsin's libraries through each system's integrated library catalogs and through WISCAT.
3. Share Inclusive Services information and resources via WVLS communications channels (blog, email, newsletter). RESULTS:
 - *Public Library Services Updates*, published by WVLS staff with content contributions from IFLS Library System staff, frequently featured resources and checklists from the Wisconsin Department of Public Instruction's *Inclusive Services Assessment and Guide*. These resources were shared with member library staff to encourage their awareness and possible implementation of inclusive actions at their libraries.
 - Monthly *Inclusive Services Updates*, published by Northern Waters Library Service staff, were shared as *Digital Lites* blog posts and archived on the WVLS website. Links to the Updates were shared in *Monday Mentions* and in weekly NWLS Continuing Education Updates, and in the WVLS Director's Report shared with the WVLS Board of Trustees and member libraries.
 - *Monday Mentions* emails promoted the following 2023 continuing education events:

- Spring Webinar Series: Beyond Diversity 101: Micro-inequities, Implicit Bias, and Moving toward Equity, April 18, and How to Move Past *Midwest Nice* and Towards Safety and Belonging, April 25
 - Part of the 'Wisconsin Libraries Talk About Race' Series, a workshop called "Becoming an Active Ally" taught allyship practices with a specific focus that is supportive of BIPOC and LGBTQIA2S+ people. Thursday, June 15 at the Waunakee Public Library and Friday, June 16 at the L.E. Phillips Memorial Library in Eau Claire.
 - Ryan Dowd's Homelessness and Libraries self-paced training opportunities made available to Wisconsin's library staff through an LSTA grant-funded project from DPI.
4. Maintain current and relevant Inclusive Services resources and tools on the WVLS website. RESULTS:
- Resources and tools helpful to member libraries were routinely shared in the monthly *Inclusive Services Update*. These updates were archived on the WVLS website.
 - Continuing Education events related to inclusive services and sponsored by Wisconsin public library systems were listed on the WVLS website.
5. Participate in regional Inclusive Services collaborations with member libraries, appropriate agencies, and other systems. RESULTS:
6. Support member library outreach efforts to extend services to underserved populations. RESULTS:
- A Website Accessibility Learning Group was formed in 2023 that includes website managers from systems and public libraries who have a special interest in learning about and implementing design tools for websites that maximize accessibility mainly for those with low/no vision. The main charge/goal of this group, which meets monthly, is to establish best practices for website design and management so they can be interpreted by those who don't have a usual visual interaction with a website. These services include good contrast design, and proper use of Alt Text for images and headings to outline a page to maximize compatibility with screen readers.
7. Provide Inclusive Services continuing education opportunities for member libraries. RESULTS:
- The following continuing education events were provided in conjunction with the "Wisconsin Libraries Talk About Race" project:
 - Spring Webinar Series: "Beyond Diversity 101: Micro-inequities, Implicit Bias, and Moving toward Equity" on April 18, and "How to Move Past *Midwest Nice* and Towards Safety and Belonging" on May 4.
 - "Build Skills & Take Action to Stand Up for Diversity, Equity & Inclusion" webinar on May 17.
 - "Becoming an Active Ally" taught allyship practices with a specific focus that is supportive of BIPOC and LGBTQIA2S+ people. Thursday, June 15 at the Waunakee Public Library and Friday, June 16 at the L.E. Phillips Memorial Library in Eau Claire.
 - Free online "American Sign Language community classes" by the Oklahoma School for the Deaf were made available in September.
 - "Wisconsin Talking Books & Braille Library: Services to Patrons and Public Libraries" webinar on November 2.
 - "Understanding and Challenging Implicit Bias in Decision-Making" webinar on December 7.
 - "Autism – A Conversation with Carly Danesh-Jones;" A Ryan Dowd training on February 8
 - A session on "LGBTQ-Inclusive Trusteeship" was held during August's Trustee Training Week, a collaboration between public library systems and DPI's Public Library Development Team.
 - Ryan Dowd's *Homelessness and Libraries*, a self-paced training opportunity for public libraries, provided staff with tools to effectively work with library users struggling with homelessness, mental illness, or substance abuse, and to provide an inclusive environment that is able to serve everyone. In addition, recordings of monthly hour-long webinars on a variety of relevant topics were archived and made available for library staff to view at times convenient to them. Thanks to

a statewide subscription, the *Homeless and Libraries* training and hour-long webinars were made available through December 2024.

8. Create **1-3 Digital Bytes** training videos related to Inclusive Services. RESULTS:

- A *Digital Byte* on the Wisconsin Talking Book and Braille Library was created to inform area colleagues about the unique collection and resources available through this agency and how to connect library users to their services.

9. Attend the annual Toward One Wisconsin Conference and share highlights with member libraries and WVLS Board of Trustees. RESULTS:

- [Toward One Wisconsin 2023](#), a conference on Equity, Diversity and Inclusion, was held April 25 – 26 in Appleton.
- This conference was promoted in the February-April monthly *Inclusive Services Updates* that were emailed to WVLS public library directors and archived on the WVLS website.
- Unfortunately, a staffing shortage prevented WVLS from taking advantage of this opportunity.

Indicate new or priority activities relating to this requirement for the plan year (2023).

1. **Incorporate EDI (Equity, Diversity and Inclusion) topics in member library discussions held throughout the year.** RESULTS:

- Staff referenced the resources and checklist in the DPI document during field visits to libraries and staff orientations, and when consulting with directors and public library services staff at member libraries.

2. **Target consulting and support on topics outlined in the Wisconsin Department of Public Instruction's *Inclusive Services Assessment and Guide*. In 2023, target member libraries' awareness of resources and checklists in "Chapter 4: What the Library Has to Offer" relating to library collections, programming, and services.** RESULTS:

- The monthly *Public Services Updates* that WVLS emailed to libraries included mention of the resources and checklists in the *Inclusive Services Assessment and Guide*.
- The monthly Inclusive Services Update emailed to libraries and archived on the WVLS website often shared information that affirmed recommended practices in the *Guide's* checklists.
- Staff referenced the resources and checklist in the DPI document during field visits to libraries and staff orientations, and when consulting with directors and public library services staff at member libraries.

Indicate new or priority activities relating to this requirement for the plan year (2024).

1. **Target consulting and support on topics outlined in the Wisconsin Department of Public Instruction's *Inclusive Services Assessment and Guide*. In 2024, continue to target member libraries' awareness of resources and checklists in "Chapter 4: What the Library Has to Offer" relating to collections, programming, and services.** RESULTS:

OTHER TYPES OF LIBRARIES

(L). Wis. Stats. 43.24(2)(I) Cooperation and continuous planning with other types of libraries in the system area which results in agreements with those libraries for the appropriate sharing of library resources to benefit the clientele of all libraries in the system area.

2023 ONGOING ACTIVITIES RELATED TO THIS REQUIREMENT:

1. Continue to sponsor the WVLS Library Advisory Committee (LAC) and schedule at least two meetings annually. Plan a discussion at each LAC meeting around broad library-related challenge or need and encourage feedback from members. RESULTS:
 - LAC meetings were held in-person on April 12 and August 18 in the WVLS office.
 - During meetings, time was provided for group discussions on modifying services and marketing. In preparation for discussions on these topics, LAC members were sent questionnaires to complete prior to the meetings.
 - Agendas and minutes of LAC meetings were shared with the WVLS Board of Trustees and archived on the WVLS website.
 - 2024 appointments to the 15-member LAC were approved by the WVLS Board of Trustees in November 2023.
2. Consider all types of libraries whenever proposals for grants and other special system projects are developed. RESULTS:
 - The "WVLS ALL" and "WVLS K-12" email lists were used to share grant information and service trends having a school library focus.
 - WVLS awarded scholarships for two school library media specialists and one public library youth librarian to attend the 2023 WEMTA (Wisconsin Educational Media and Technology Association) Conference in Rothschild.
 - In December, WVLS promoted a scholarship for the WEMTA Conference that will be held March 3-5, 2024 in the Wisconsin Dells.
3. Provide consultant services to all types of libraries in the WVLS area - reported under requirement S43.24(2)(e). RESULTS:
 - The "WVLS ALL" and "WVLS K-12" email lists were used to share grant opportunities, Beanstack information, continuing education events, WVLS WEMTA Conference Scholarships, ideas for collaboration and partnerships and service trends having a school library focus.
 - Staff was represented on the in Connecting Wisconsin Libraries: Public & School Library Collaboration Committee in 2023.
 - Staff arranged to attend the Connecting Wisconsin Libraries virtual meeting on January 18, 2024.
4. Provide reference and interloan services to all types of libraries in the WVLS area. RESULTS:
 - This mission critical service was provided throughout 2023.
 - WVLS maintained the catalogs of 25 member public libraries aggregated in an online database known as "V-Cat." Available to view by any library and to fully use by anyone with a V-Cat member library card, this resource served as the primary vehicle for interlibrary loan (ILL) between WVLS public libraries.
 - In 2023, 23 of 25 WVLS member public libraries, 20 school/academic libraries, and one special library participated in WISCAT. The Edith Evan Community Library (Laona) and Westboro Public Library were the two libraries that chose not to participate in 2023.

- The State's WISCAT product continued to serve as the interlibrary loan vehicle for our public and multitype libraries to fill patrons' requests for items not found locally or available in the V-Cat database.
 - WVLS acted as the interlibrary loan clearinghouse on behalf of all libraries using WISCAT in the system area to facilitate the sharing of materials.
 - Libraries of all types were encouraged to contact WVLS for assistance with reference questions and WISCAT/Interlibrary loan.
5. Invite libraries of various types to attend and host WVLS continuing education events. RESULTS:
- Staff from multitype libraries were invited to WVLS continuing education and training opportunities throughout the year. Examples include:
 - In-person webinars such as the 2023 Wild Wisconsin Winter Web Conference, 2023 Spring Webinar Series, and 2023 Tech Days. All of these sessions were recorded and archived for later viewing by those unable to attend the live events.
 - School librarians were invited to attend the 35th Annual Rhinelander Children's Book Fest held May 1-2, 2023.
 - Continuing education events hosted and co-hosted by WVLS were promoted via the WVLS *Digital Lites* blog, Monday Mentions email, monthly *WVLS Newsletter*, monthly *Inclusive Services Update*, WISPUBLIB (the state's public library listserv), Facebook and direct email to public and school librarians.
 - Events were shared with other public library system continuing education consultants who were encouraged to forward announcements to libraries of all types located in their respective service area.
6. Encourage libraries of all types in the WVLS area to join WVLS' listservs as appropriate for their positions, to subscribe to the WVLS newsletter, and to browse the WVLS blog *Digital Lites*. RESULTS:
- Staff requested library directors to provide emails of new staff members and recommendations for appropriate placement on WVLS listservs.
 - WVLS communication tools were discussed and promoted during youth and adult services virtual gatherings, meetings of the WVLS Board, Library Advisory Committee and V-Cat Council, and when consulting and/or networking with member colleagues.
7. Announce available grants for area libraries of all types to consider. RESULTS:
- The "WVLS ALL" and "WVLS K-12" email lists, WVLS *Digital Lites* blog, *Monday Mentions* emails, WVLS and WVLS Youth Services Facebook pages, monthly *Inclusive Services Update*, and direct emails to school and public librarians were used to announce grant opportunities available throughout the year.
 - Following is a sampling of grant opportunities available to libraries of all types that were announced in 2023:
 - 2023-24 National Endowment for the Arts
 - Big Read Program ALSC/Candlewick Press "Light the Way" Grant Institute of Electrical and Electronics Engineers (IEEE)
 - WiLS 2023 Ideas to Action Fund
 - 2023 WVLS WEMTA Conference Scholarship
 - The availability of a WVLS scholarship to attend 2024 WEMTA Conference scholarship was promoted via *Monday Mentions*, the K-12 email list, on Facebook, and the *WVLS Newsletter* in December.
8. Initiate discussions with other types of libraries to determine if/how collaborative efforts might improve services to patrons/library staff/trustees in the WVLS library community. RESULTS:

- To understand, inform, and advance methods of collaboration among all types of libraries, WVLS was a presence at meetings of the Connecting Wisconsin Libraries: Public & School Library Collaborations Committee.
9. Partner with all types of libraries in the WVLS area to provide workshop, training, [discussion](#) and resource sharing opportunities for area libraries. RESULTS:
- Workshops and trainings, and collaborative and resource sharing opportunities for area libraries were routinely suggested during LAC meeting discussions, and through WVLS listservs, website, Facebook and blog posts, and monthly *Inclusive Services Update*.
 - Staff from multitype libraries were invited to attend WVLS continuing education and training opportunities throughout the year.
 - Staff from multitype libraries were invited to apply for scholarships to attend the 2023 and 2023 WEMTA Conferences.
 - Continuing education and networking opportunities, and programs that may be of interest to school and public libraries, were routinely shared with WVLS school and public librarians in the area of early literacy as well as other topics promoted by state and regional agencies.
10. Build on existing collaborative efforts by participating in statewide committees, workgroups and organizations. Continue representation on the informal Connecting Wisconsin Libraries – School and Public Libraries Committee. RESULTS:
- WVLS served as fiscal agent for a statewide contract for Beanstack for school libraries from July 2021 – April 2023.
 - Staff participated in Wisconsin Early Childhood Collaborating Partners (WECCP) Regional Action Teams spanning the WVLS area to continue building relationships with educators and organizations supporting young families.
 - Staff maintained membership on the Connecting Wisconsin Libraries: Public & School Library Collaborations Committee.

Indicate new or priority activities relating to this requirement for the plan year [\(2023\)](#).

1. [Offer scholarships to attend the Wisconsin Educational Media & Technology Association \(WEMTA\) Conference to public or school library staff who have not previously attended. \(Note: This is also reported under OTHER TYPES OF LIBRARIES.\)](#) RESULTS:
- Scholarships were awarded to three colleagues to attend the Wisconsin Educational Media and Technology Association (WEMTA) Conference held February 5-7, 2023, in Rothschild, WI. Scholarships went to Kay Heiting, Granton Community Library; Julie Beloungy, Thorp School District; and Kristie Heistad, Antigo Public Library.
 - The availability of a WVLS scholarship to attend 2024 WEMTA Conference scholarship was promoted via *Monday Mentions*, the K-12 email list, on Facebook, and the *WVLS Newsletter* in December.

Indicate new or priority activities relating to this requirement for the plan year [\(2024\)](#).

None indicated.

LIBRARY TECHNOLOGY AND RESOURCE SHARING

(M). Wis. Stats. 43.24(2)(m) Planning with the division and with participating public libraries and other types of libraries in the area in regard to library technology and the sharing of resources. By January 1, 2000 and every 5th January 1 thereafter, the public library system shall submit to the division a written plan for library technology and the sharing of resources.

Technology / Network

2023 ONGOING ACTIVITIES RELATED TO THIS REQUIREMENT:

1. Facilitate continued development and expansion of "LEAN Wisconsin" (LEAN WI), a technology resource sharing partnership between multiple systems, and "Libraries Win", the joint technology services platform it hosts and maintains. Maintain joint LEAN WI Library System Long Range Strategy and Operational Technology Plan. RESULTS:7
 - Partnership-wide consolidation and unified utilization of software licensing and services continued. LEANWI partners jointly adopted a new add-on component to Microsoft System Center Configuration Manager which enables automation of updates management for many common 3rd party applications not covered by Microsoft Windows Updates.
 - Partners utilized LSTA support to continue cybersecurity testing and education platform services with intent to focus on more testing and training campaigns from 2023 to 2026.
 - LEAN WI partners leveraged federal ECF (Emergency Connectivity Fund) support to continue mobile hotspot services through 2023 for all member libraries lending Kajeet devices.
2. Facilitate strategic growth within the LEAN WI partnership and lead efforts of technology collaboration with other library systems and organizations. RESULTS:
 - Continued internal and external efforts to provide leadership, guidance and support for the Statewide Collaborative Backup and Archive project.
 - LEAN WI was represented across each of the three technology-related steering committees in WPLC and helped with reshaping of the Backup and Archive Steering Committees into working groups to be more agile and less encumbered by WPLC governance structures.
3. Maintain strategic and operational awareness of federal, state, and regional programs and efforts intended to support and empower library technology services, including Universal Service Administrative Company School and Library Program (USAC SLP – erate), TEACH Wisconsin, BadgerNet, Wisconsin Department of Public Instruction, Wisconsin Public Library Consortium (WPLC), and others. RESULTS:
 - LEAN WI utilized a portion of the \$309,800 ECF support awarded in 2022 for continuity of existing mobile hotspot utilization during 2023. Due to the utilization rate for existing devices not being at or near 100%, LEAN WI partners elected not to utilize the new devices and services awards.
 - LEAN WI partners continued the practice of consolidating our respective LSTA "Sparsity Award" allocations to be managed as one award primarily for joint use licensing, services, and equipment. This shared project management allows for greater efficiency in overall grant management and for broader, more holistic awareness of our needs, to best utilize the support.
4. Lead vendor relationship management and strategic procurement efforts for LEAN WI partners, member libraries and other interested library systems. RESULTS:

- Continued efforts within multi-system joint computer procurement relationship with Dell.
 - Continued recently developed service relationships with Princh (public computer and BYOD print management) and Kajeet (mobile hotspot devices, data service plans, and centralized management services).
 - LEAN WI partners began a strategy of proactive engagement with AT&T's (and secondary vendors') project management teams after a number of AT&T-led "BadgerNet" to "TEACH Network" data transport network service migrations failed during the 3rd and 4th quarters.
5. Assist member libraries within the LEAN WI footprint with technology consultation, long range strategic planning, and operation planning. RESULTS:
- 2023 was a year of catch up and recovery from technical support staffing challenges in previous years.
 - Staff monitored and consulted (on behalf of Taylor Co Libraries) on public library-related fiber and equipment installations for the Taylor County fiber network buildout. This distinct project and its implementation coincided with the TEACH project to migrate TEACH BadgerNet customers from the BadgerNet network to the new TEACH Network pushing the timeline for utilization testing and implementation of strategic use into 2024.
 - Site visits to 23 WVLS LEAN WI libraries were conducted to complete end-user (computer) technology inventories and complete 5-year recommended replacement reports for library staff.
 - Member libraries' computers were updated to the latest supported operating systems.
 - Standard practices for maintaining and using public and staff computers and systems were implemented.
 - Inventory reports for member libraries were prepared to submit to a shared LEANWI inventory system.
6. Coordinate in-person and remote meetings with public library directors and technology managers of LEAN WI member libraries to establish and maintain working relationships, engage in technology assessment projects with their respective libraries, and facilitate collaborative efforts between libraries. RESULTS:
- WVLS shifted to a split approach to primary liaising for onsite or direct technology services engagement with the CIO being primary for the two largest libraries, MCPL and TB Scott Free Library due largely to locale and direct accessibility. The WVLS Data and Technology Services Consultant acted as primary technology services liaison for the other libraries. Each role acted as secondary to the other allowing for depth of coverage while separating the consultants' primary focus of the two most unique technology environments from those operating almost entirely under LEANWI and WVLS standard operations.
 - Technology consultation and support outreach for Marathon County Public Library increased in 2023 and is projected to increase further going forward.
 - While outreach and direct support with other member libraries increased overall a higher level of engagement with administration and technology management at TB Scott Free Library (Merrill) is planned for 2024.
 - Staff began initial assessments of library technology status and strategic planning to establish documentation and groundwork for future technology projects planning.
7. Strengthen Libraries Win integrated services:
Lifecycle Procurement utilization and Capital Procurement Assistance support. RESULTS:
- A new online procurement request system and internal workflows were established to efficiently manage member libraries' equipment orders through all phases of procurement – requesting, purchasing, installing, invoicing.

Printer device and print management services coordination and support. RESULTS:

- Documentation and FAQs were created for libraries currently using a print management system or for those who may be interested in having one available for library users in the future. Ultimately, the goal of effort was to improve members' understanding of the service and associated onboarding process and to increase the number of libraries using the service.

Indicate new or priority activities relating to this requirement for the plan year (2023).

1. **Priority (annual)** - Assess LEAN WI and Libraries Win service stacks, evaluating and reporting on service take rates, prioritization for continuity, depth of staffing, etc., and work with administration of LEAN WI partners to inform long range technology strategy, operational technology planning, and annual system planning. RESULTS:

- Cursory assessments on 2023 operations were made throughout the year.
- Review of information gathered, and of assessments made during 2022 and 2023, will be conducted prior to drafting the *2025-2029 LEAN WI Information Technology Strategic Plan* (System Technology Plan shared jointly by IFLS, NWLS, and WVLS) that will be submitted to DPI in late 2024.

2. **Priority (annual)** - Explore and develop new service opportunities to benefit member libraries. Continue aggregation, realignment, and consolidation (ARC) project evolution.
 - Enhance processes for coordinating service-level and system-level planning requiring technology resources and support.
 - Coordinate with administration and service area teams across LEAN WI partners to broaden awareness of technology resources currently utilized and identify common long-term goals and technology resource needs.
 - Expand long term efforts to consolidate common technology resources with broader scope across service areas.
 - Develop and promulgate unified guidance with consistency across LEAN WI partners.

RESULTS:

- Opportunities were identified to adopt and align standard practices used by other LEAN WI partners to both provide consistent service and to allow technology staff in all systems the ability to address technical issues and to create resources for all LEAN WI libraries.
- Little additional direct engagement occurred related to overall ARC project evolution in the areas of planning and coordination around unified services. However, the late-year concerted effort by LEAN WI partners to establish a new, joint role for 2024 focused initially on website services and which may eventually cross into digitization, data, or other natively joint service areas represents an opportunity to review and improve upon planning coordination for those services along with traditionally siloed tech support services LEAN WI has been gradually unifying since inception.

Indicate new or priority activities relating to this requirement for the plan year (2024).

1. **Priority (annual)** - Assess LEAN WI and Libraries Win service stacks, evaluating and reporting on service stack rates, prioritization for continuity, depth of staffing, etc., and work with administration of LEAN WI partners to inform long range technology strategy, operational technology planning, and annual system planning.
2. **Priority (annual)** - Explore and develop new service opportunities to benefit member libraries. Continue aggregation, realignment, and consolidation (ARC) project evolution.
 - Enhance processes for coordinating service-level and system-level planning requiring technology resources and support.

- Coordinate with administration and service area teams across LEAN WI partners to broaden awareness of technology resources currently utilized and identify common long-term goals and technology resource needs.
- Expand long term efforts to consolidate common technology resources with broader scope across service areas.
- Develop and promulgate unified guidance with consistency across LEAN WI partners.

ILS Administration

2023 ONGOING ACTIVITIES RELATED TO THIS REQUIREMENT:

1. Host V-Cat council meetings and V-Cat committee meetings. RESULTS:

- V-Cat Council met five times in 2023, in February, April, May, June, September, and November. Along with regular business and financial approvals, the Council passed new and updated recommendations for the following:
 - Billable Noted Missing Pieces Form – updated for process improvement
 - High Demand Items – updated for clarity about overrides
 - Damaged and Missing Pieces Guidelines – updated for process improvement
 - Billable Damage Guidelines – new standards outlining when libraries may bill patrons for damage, for consistency across member libraries
 - Circulation Guidelines – updated for clarity about overrides
 - Item Record Volume Field – updated for better user experience in Aspen
 - Multi-Item Sets – updated for better user experience in Aspen
 - V-Cat Library Card Application and Patron Record Guidelines – updated for consistent patron record fields, and standards for library card applications
- V-Cat Bibliographic/Interface Committee met five times in 2023, in January, May, August, October and December. During 2023, the Committee worked on the following projects: a new procedure for cataloging jigsaw puzzles, evaluation of SkyRiver as a possible replacement for OCLC, updates to the Multi-item set and Volume Fields in Item Records Recommendations for clarity, and updates to Aspen format names and cover image procedures.
- V-Cat Cooperative Circulation Committee met six times in 2023, in March, June, July, August, October and December. The committee presented flowcharts to assist member library staff with handling items that are damaged or missing pieces. The committee also developed a standardized library card application and patron record guidelines that were presented to V-Cat Council in November.
- V-Cat ILS Evaluation and Review Committee met eight times in 2023, in February, March, May, June, July, and three times in August to complete a comprehensive evaluation and review of vendor product information and support that began in March 2022. As part its charge, the Committee gathered product information from vendors, their customers, and library staff – comparing the capabilities of several systems to the needs of V-Cat member library staff as well as the needs of the consortium as a whole. In addition to demonstrations, surveys, additional discussion and follow up with vendors and product users, the committee evaluated the final two candidate systems directly (through ongoing daily use in Sierra's case, and use of a sandbox version of Koha provided by ByWater). A final report that summarized the Committee's findings and recommended the V-Cat consortium stay with its current vendor (Sierra from Innovative Interfaces, Inc.) was presented to the V-Cat Council in September. A formal decision on this recommendation by the V-Cat Council and the WVLS Board of Trustees is on hold pending decisions made within the NICE project.

2. Develop and monitor V-Cat budget. RESULTS:

- The V-Cat budget was monitored as invoices were received and new expenditures considered.
 - In 2023, monthly V-Cat budget reports and expenditures were presented to the V-Cat Council and WVLS Board of Trustees for approval.
 - A draft 2024 V-Cat budget and appropriations plan was presented to the WVLS V-Cat Steering Committee in March. The draft recommended by the Committee was then submitted to the V-Cat Council and WVLS Board of Trustees for further review.
 - The 2024 V-Cat Budget was approved by the V-Cat Council in June 2023 and WVLS Board of Trustees in September 2023.
3. Review V-Cat By-laws, participation agreements, and contracts. RESULTS:
- New directors at V-Cat libraries were made aware of existing Participation Agreements and V-Cat Bylaws during their orientations.
 - As part of the ILS Evaluation and Review process, current V-Cat contracts were considered along with information from other vendors.
 - An LSTA grant funded joint ILS Exploration project with Northern Waters Library System, named Northern Wisconsin ILS Consortium Exploration (NICE), began in 2022 and will continue in 2024. The exploration includes a review of both V-Cat and Northern Waters Library Network by-laws agreements and governance structures.
 - The current cataloging utility contract with OCLC was reviewed as part of an effort to negotiate for a reduced quote. Due to OCLC's rising costs, the Bibliographic / Interface Committee and WVLS investigated the cataloging utility SkyRiver (supported by Innovative) as an alternative to OCLC. The investigation concluded that V-Cat maintain its current subscription to OCLC for another year.
4. Maintain awareness of the organizational structure and funding mechanisms of other ILS consortia in the state for best practices and optimized governance. RESULTS:
- The Northern Wisconsin ILS Consortium Exploration (NICE) with Northern Waters Library Service includes a review of both V-Cat and Northern Waters Library Network governance and funding structures. The exploration project began in 2022 and will continue in 2024.
5. Convene the V-Cat Steering Committee to assist staff in developing the annual V-Cat budget, and reviewing V-Cat bylaws. RESULTS:
- The WVLS V-Cat Steering Committee met in March 2023 to review a draft 2024 V-Cat Budget and provide a budget recommendation to present to the V-Cat Council.
6. Work to encourage cooperative and participatory V-Cat membership that adheres to the set V-Cat guidelines and procedures. RESULTS:
- V-Cat Council and V-Cat Committee meetings provided opportunities for members to report issues and for the consortium to draft/recommend/adopt new guidelines and procedures when necessary.
 - When made aware of libraries not adhering to V-Cat guidelines and procedures, staff followed up with libraries to encourage compliance and to offer additional training and support.
 - Reports were provided to V-Cat libraries to encourage compliance with V-Cat guidelines related to item, patron, and bibliographic records.
7. Remain alert to the impact of V-Cat as it relates to members' collection related policies and practices. RESULTS:
- V-Cat Council and V-Cat Cooperative Circulation Committee meetings provided opportunities for members to report issues related to collection development policies and practices and for the consortium to draft/recommend/adopt new guidelines and procedures when necessary.

- Staff responded to requests for assistance with issues related to collection development policies and practices.
 - WVLS hosted an informal gathering of area library staff responsible for collection development tasks and encouraged communication and collaboration among member libraries.
8. Continue to monitor unmediated interloan between V-Cat participants. RESULTS:
- Data for this activity was monitored monthly as V-Cat statistical reports were generated.
 - Libraries participating in V-Cat were provided monthly circulation reports that included data on interlibrary loan activities.
 - Yearly statistics are provided in an appendix at the end of this document and shared in the annual WVLS Statistics booklet.
 - When made aware of libraries not adhering to V-Cat resource sharing guidelines and procedures, staff followed up with them to encourage compliance and communication between libraries and to offer additional training.
 - Reports were provided to V-Cat libraries to encourage compliance with V-Cat guidelines related to item and patron records.
9. Seek opportunities to expand V-Cat Membership. RESULTS:
- With assistance from a competitive LSTA grant, a collaborative ILS exploration project with the Northern Waters Library Service launched in 2022. The project, now known as NICE (Northern Wisconsin ILS Consortium Exploration) will continue in 2024.
10. Assess and evaluate member libraries' satisfaction with the effectiveness of V-Cat to support continuous improvement of V-Cat. **(Practice and Collaboration)** RESULTS:
- Input from V-Cat Council meeting discussions, questions and feedback via the Help Desk ticketing system, and conversations with area colleagues continued to inform service priorities and identify areas where increased collaboration or training are needed.
11. Provide qualified, trained staff devoted to the management and support of the shared Integrated Library System (ILS). RESULTS:
- The ILS Administrator and ILS Support Specialist attended training and continuing education opportunities to enhance management and support of the shared ILS including direct training with Innovative Interfaces and Aspen.
 - Staff also attended online webinars offered through the 2023 Wild Wisconsin Winter Web Conference, Wisconsin Illinois Innovative Users Group (WILUIG), and Wisconsin Library Association's Technical Services Section and relevant in-person sessions at the Wisconsin Association of Public Libraries (WAPL) and Wisconsin Library Association conferences.
12. Manage the shared ILS database. RESULTS:
- Staff continued to manage and support the V-Cat Consortium's ILS.
 - Database changes were made to streamline staff and patron experiences. Changes made include:
 - Items statuses streamlining
 - Reducing the number of libraries charging additional fees for billed/lost items
 - Updating settings to unify the amount of time items remain on the hold shelf at libraries.
 - Purging patron records with no fines that were expired and inactive for five years or more.
 - Libraries were encouraged to participate in database cleanup and to update patron records to eliminate multiple patron barcodes.
13. Offer library profile customization services for V-Cat members. RESULTS:

- Libraries' Aspen Discovery sites were adjusted upon request. Each library has the ability to customize specific settings and featured collections.
- Additional loan rules were created and modified for libraries upon request.
- Additional location codes were created for libraries upon request.
- Additional print templates were created or modified for libraries upon request.
- Support was provided to MCPL during its implementation of a new self-checkout and automatic materials handling system.

14. Offer training opportunities and resources using a variety of delivery methods. RESULTS:

- Online and in-person training opportunities were offered on the following topics:
 - Sierra Create Lists
 - Sierra Cataloging – Attaching Items
 - Sierra Cataloging – MARC Alerts
 - Sierra Cataloging – Z39.50 Importing Records
 - Aspen Record Grouping
 - Sierra Inventory Methods
 - Aspen Refresher Training
 - Aspen Cover Image Training
- Training on Sierra Interlibrary Loan and V-Cat Consortium Basics for New Directors was provided as needed.
- Additional individualized trainings were offered upon request.
- Any training opportunities that were recorded were shared with V-Cat Consortium members upon request.
- The V-Cat Training webpage was routinely updated to share information on the V-Cat Council and committees pursued ILS projects and improved process.
- Short trainings were offered during V-Cat Council meetings to highlight V-Cat Guidelines, Sierra functions, and Aspen features.

15. Work with V-Cat committees to normalize V-Cat policies, procedures, and practices among member libraries. RESULTS:

- Staff worked with individual libraries to streamline item statuses, loan rule facets including fines and fees.
 - The volume of item statuses was reduced to streamline staff and patron experience.
 - The number of libraries charging additional fees for billed items was reduced.
 - Settings for the number of days items remain on the hold shelf were unified to be consistent across libraries.
 - Two V-Cat libraries reduced fines or went fine free in 2023.
- Staff and V-Cat Cooperative Circulation Committee presented flowcharts to member libraries to assist with handling items that were damaged or missing pieces.
- The V-Cat Cooperative Circulation Committee developed a standardized library card application and patron record guidelines that the V-Cat Council approved in November.
- Staff and V-Cat Bibliographic/Interface Committee clarified the Multi-Item Sets and Volume Field in Item Records recommendations.
- The V-Cat Bibliographic/Interface Committee shared a procedure with member libraries to help with adding consistent information to bibliographic records for jigsaw puzzles.

16. Provide an effective and efficient way for member libraries' holdings to be added to the database. RESULTS:

- Many member libraries continued the use of Z39.50 cataloging, which reduces time on cataloging tasks and improves bibliographic records in the database.
- Staff responded to cataloging questions and provided training and support upon request.
- WWLS partnered with one V-Cat library to assist with MarcAlert review in 2023.

- Staff offered item record attachment training when needed.
17. Work with member libraries to establish preferred practices and procedures for entering bibliographic and item holding records in the V-Cat database in accordance with currently accepted library cataloging and classification practices. RESULTS:
- Cataloging training was provided in Spring and Fall 2023, and training documentation was made available on the WVLS website. Staff addressed any concerns or questions raised by member libraries.
 - The V-Cat Bibliographic/Interface Committee met several times throughout 2023 to address new cataloging procedures and needs.
18. Ensure that bibliographic records, item records, and item status for materials in the V-Cat database are searchable through standard protocols. RESULTS:
- This was an ongoing activity and integral to standard operations.
 - Ongoing maintenance and routine monitoring were helpful for checking consistency and accuracy of database records throughout the year.
 - Staff checked the database monthly for new bibliographic records added to the database without subject headings. Follow-up occurred with the library staff cataloger for correction and additional training opportunities were offered.
 - Bibliographic records were searchable by patrons by title, author, keyword, subject heading, and more. This searchability was ensured by saving and updating records to include the most accurate information possible. Training was provided twice in 2023 to assist library staff in this effort. In addition, documentation was made available on the WVLS website.
 - Improvements were made to the Aspen Discovery catalog, and to database records to enhance discovery of new materials.
 - WVLS worked with interested library staff to create a record grouping team to identify and correct record grouping errors in the Aspen Discovery Catalog.
 - An additional improvement was made to the Aspen Discovery Catalog to include a new format label of "Read-Along Book."
 - WVLS worked closely with the Aspen team to improve format assignments for Blu-Rays and Blu-Ray/DVD Combo packs.
19. Ensure access to reports to assist member libraries in managing ILS data. RESULTS:
- All V-Cat libraries had access to Web Management Reports reporting tools for Sierra.
 - All V-Cat libraries had access to Sierra "Create Lists" and training was provided upon request.
 - V-Cat report documents were maintained/archived on the WVLS website.
 - Additional reports were emailed to V-Cat libraries on a monthly basis to assist them with regular record clean up.
 - Statistical reports for patron and holdings information were generated for each V-Cat library to complete their 2022 annual report.
 - Additional reports were provided upon request.
20. Provide V-Cat consortium members with statistical data generated by the ILS as required for the DLT Public Library Annual Report, using standard definitions supplied by DLT. RESULTS:
- Spreadsheets for collection data (number of books owned/added, number of videos owned/added, number of audios owned/added), annual circulation totals and children's circulations totals, total number of resident and nonresident registered borrowers, digital library collection data (holdings and total number of downloads for each collection), and resident/nonresident circulation totals were generated for each V-Cat consortium library in preparation for the 2022 public library annual report project.
 - Statistics were entered into the state's online 2022 annual report form on behalf of V-Cat consortium members.

- Statistical data was shared with libraries in January, which provided enough time for libraries to complete their annual reports by the March 1 statutory deadline.
 - V-Cat report documents were maintained/archived on the WVLS website.
21. Assess and evaluate member libraries' satisfaction with ILS support, the online catalog, discovery products, and training needs. **(Vendor Products and WVLS Support) RESULTS:**
- Input from member libraries continues to be fundamental to the WVLS team's evaluation of ILS support, service response, and training opportunities.
 - Input from V-Cat Council meeting discussions, questions and feedback via the Help Desk ticketing system, and conversations with area colleagues continued to inform service priorities and guide allocation of resources.
 - Feedback was gathered from library staff to determine needs and priorities for ILS products.
 - The V-Cat ILS evaluation and review process was completed in 2023. See highlights of the V-Cat ILS Evaluation and Review Committee's activities reported under #1 above.
22. Continue to explore enhancements to the ILS, including peripheral ILS-related products and technologies, to improve V-Cat experience for consortium members and library patrons. RESULTS:
- Staff read relevant articles, attended webinars, and connected with other ILS Administrators to remain current on new features available from vendors and investigate enhancements to the system.
 - Staff participated in Innovative User Group and Aspen communication channels to collaborate and learn best practices for Sierra, Aspen, and related products.
 - Staff met with other Aspen catalogers to learn about best practices, assist with changing the Aspen Discovery code that affects grouping and title display, and to improve discoverability for patrons in Aspen.
23. Encourage libraries to consider new ILS enhancements, including peripheral ILS-related products and technologies, investigate group pricing options, and assist with implementation and training as needed. RESULTS:
- WVLS provided support for a member library's implementation of new self-checkout and automatic materials handling check-in units that involved working with multiple vendors.
 - Circa inventory training was provided for library staff.
 - Shoutbomb Broadcast was implemented to deliver optional text message reminders and event promotions to library patrons.
 - WVLS and the Bibliographic / Interface Committee considered the cataloging utility SkyRiver as a replacement for OCLC. It was decided to continue the V-Cat subscription to OCLC as it proved to perform better for member libraries' current needs.
24. Work with the V-Cat Council and its committees to implement enhancements to the ILS, including peripheral ILS-related products and technologies. RESULTS:
- Staff modified and customized the Aspen discovery catalog with input from V-Cat Committees and member libraries to improve the search and discovery of library resources for staff and patrons.
25. Explore collaborative options with other library systems in Wisconsin to improve ILS services and support. RESULTS:
- Staff frequently communicated with colleagues from other Wisconsin public library systems whose ILS consortiums use Sierra, a product of Innovative Interfaces, Inc. These constructive

interactions helped inform V-Cat recommended practices, procedures, upgrades, and new features.

- Staff met with Northern Waters Library System staff to explore opportunities for collaboration in the ILS Evaluation and Review process.
- See also nos. 6 and 7 in the section below.

26. Assess and evaluate V-Cat from the user's perspective to support continuous improvement of V-Cat.
(User Experience) RESULTS:

- The results of a survey of library users WVLS conducted in 2020 was referenced to determine priorities for processes related to search and discovery of library materials, database content and e-books/digital audiobooks.
- Ongoing feedback from member library staff and library users continues to inform product development requests, record improvements, and adjustments to Sierra, and Aspen discovery.

27. Participate in Innovative Users Group (IUG) and other professional organizations. RESULTS:

- Staff participated in IUG, Wisconsin Illinois Innovative User Group (WILIUG), Aspen Community, Wisconsin Association of Public Libraries (WAPL), and Wisconsin Library Association (WLA).

Indicate new or priority activities relating to this requirement for the plan year (2023).

1. Continue to work toward developing sufficient local funding of V-Cat to ensure the stability of its operation and to alleviate the risk in the event of changes to regional library systems in Wisconsin. (Relates to ILS Administration no. 2 above.) RESULTS:

- This ongoing effort continued in 2023. WVLS worked with the WVLS/V-Cat Steering Committee and the V-Cat Council to develop the 2024 budget, including increases in appropriations to decrease the amount subsidized by WVLS.

2. Continue database clean-up project to strive toward standardization of records and record fields. (Relates to ILS Administration nos. 13, 14, 15, 17, 18, and 20 above.) RESULTS:

- The database underwent routine maintenance and monitoring throughout the year and were helpful methods to check for consistency and accuracy of database records.
- Monthly queries of the database identified bibliographic records that needed improvement. When inaccuracies were identified, staff connected with area library catalogers to correct the records.
- Library staff were sent patron records having multiple, incorrect, or missing barcodes for cleanup.
- Staff and V-Cat Cooperative Circulation Committee members continued their review of patron record fields to promote consistent use of fields and data entry. The committee developed a standardized library card application and patron record guidelines, which were approved by the V-Cat Council in November 2023.

3. Continue to refine current processes used to generate reports from ILS data, including those required for the DLT Public Library Annual Report. **Continue to further automate** report generation and data visualizations. (Relates to ILS Administration nos. 8, 19, 20, 22, 24 and 25 above.) RESULTS:

- Queries of the ILS database were developed, and data results were tested against current reports to validate data accuracy.
- Staff and member libraries worked together to test changes and resolve any unexpected behavior in the database.
- Staff continued efforts to automate data aggregation and report generation processes for monthly and annual report preparation to reduce staff time needed to process data processes for more efficient reporting.
- Further automation of report generation and data visualizations will be conducted in 2024.

4. Continue to develop and promote ILS training using a variety of delivery methods, published in an academic year schedule to allow our librarians plenty of time to plan to attend. (Relates to ILS Administration nos. 6, 14, 16, 17, 19, 21, 23 above.) RESULTS:
 - Formal training sessions were offered in spring and fall on the following topics:
 - Sierra Create Lists
 - Sierra Cataloging – Attaching Items
 - Sierra Cataloging – MARC Alerts
 - Sierra Cataloging – Z39.50 Importing Records
 - Aspen Record Grouping
 - Sierra Inventory Methods
 - Aspen Refresher Training
 - Aspen Cover Image Training
 - Any training opportunities that were recorded were shared with V-Cat Consortium members upon request.
 - Additional individualized trainings were offered upon request.
 - Training on Sierra Interlibrary Loan and V-Cat Consortium Basics for New Directors was provided as needed.
 - The V-Cat Training webpage was routinely updated to share information on the V-Cat Council and committees pursued ILS projects and improved process.
 - Short trainings were offered during V-Cat Council meetings to highlight V-Cat Guidelines, Sierra functions, and Aspen features.

5. If applicable, continue ILS migration process. **Re-evaluate and re-negotiate current ILS contract or negotiate a new service contract with another ILS/Next Gen ILS and begin migration process if applicable.** (Relates to ILS Administration points 12, 21-26 above.) RESULTS:
 - Initiated in March 2022, a comprehensive evaluation and review of vendor product information and support was completed by the V-Cat ILS Evaluation and Review Committee in August.
 - A final report that summarized the Committee's findings and recommended the V-Cat consortium stay with its current vendor (Sierra from Innovative Interfaces, Inc.) was presented to the V-Cat Council in September.
 - A formal decision on this recommendation by the V-Cat Council and the WVLS Board of Trustees is on hold pending decisions made within the NICE project.

6. **Investigate cataloging practices of other consortia and compare with WVLS practices. Develop a plan to implement best practices as appropriate.** (Relates to ILS Administration nos. 6, 12, 14-18.) RESULTS:
 - WVLS participated in the LSTS 2022/2023 and 2023/2024 improved Discovery Solutions Grants awarded to the Northern Waters Library System to support the Cooperative Cataloging Exploration Project initiated in 2022.
 - What began as a collaboration of 7 public library systems in late 2022, is now a collaboration of all 15 systems.
 - As a part of these grant projects, staff joined a newly developed Statewide Bibliographic Standards Committee. The goal of this committee is to create minimum standards for bibliographic records in the state.
 - A summary of the 2022/2023 grant project was featured in a WVLS Director's Report that was shared with the WVLS Board of Trustees and member libraries in May.

7. **Collaborate with Northern Waters Library Service to determine the value and feasibility of WVLS/V-Cat and Northern Waters Library Service/NWLN sharing a single integrated library system database and merging the respective ILS**

consortia. If applicable, take steps to merge the systems' databases and respective consortia. RESULTS:

- With help from a 2022/2023 LSTA Improved Discovery Solutions grant, WVLS, NWWLS and member libraries from each system, completed the first year of a 2–3-year ILS Consortium Exploration project.
- The project, named NICE (Northern Wisconsin ILS Consortium Exploration) is a comprehensive joint project to determine the value and feasibility of a merger between the two Integrated Library Systems implementations and respective ILS consortia.
- Based on the data and information gathered in 2022-2023, the NICE team determined that an ILS merger of the two integrated library systems was a valuable and feasible endeavor. The NICE team recommended that NWLS and WVLS pursue a joint ILS and move towards shared practices and policies.
- With help from a 2023/2024 LSTA Improved Solutions grant, NICE activities continued. In mid-2023, the NICE team formed workgroups to address matters that have potential to impact an ILS merger. It is expected that workgroups will prepare a suite of recommendations in the following areas:
 - ILS Vendor Selection
 - Delivery
 - Funding Formula and Budget
 - Collaborative Decision Making
 - Hold Fulfillment
 - Record Standards
 - Cataloging Practices

Indicate new or priority activities relating to this requirement for the plan year (2024).

1. Continue to work toward developing sufficient local funding of V-Cat to ensure the stability of its operation and to alleviate the risk in the event of changes to regional library systems in Wisconsin. (Relates to ILS Administration point 2 above.) RESULTS:
 - This ongoing effort is expected to continue in 2024. WVLS will work with the WVLS/V-Cat Steering Committee and the V-Cat Council to develop a 2025 budget that continues to decrease the amount subsidized by WVLS.
2. Continue database clean-up project to strive toward standardization of records and record fields. (Relates to ILS Administration nos. 13, 14, 15, 17, 18, and 20 above.) RESULTS:
 - This effort will continue in 2024 with consideration of clean-up projects to prepare for a potential ILS merger with Northern Waters Library Network.
8. Continue to refine current processes used to generate reports from ILS data, including those required for the DLT Public Library Annual Report. **Continue to further automate** report generation and data visualizations. (Relates to ILS Administration nos. 8, 19, 20, 22, 24 and 25 above.) RESULTS:
 - Queries of the ILS database were developed, and data results were tested against current reports to validate data accuracy.
 - Staff and member libraries worked together to test changes and resolve any unexpected behavior in the database.
 - Efforts continued to further automate data aggregation and report generation processes for monthly and annual report preparation to reduce staff time needed to process data aggregation activities for more efficient reporting.
 - Further automation of report generation and data visualizations will be conducted in 2024.

9. **If applicable, continue ILS migration process.** (Relates to ILS Administration points 12, 21-26 above.) RESULTS:
- Initiated in March 2022, a comprehensive evaluation and review of vendor product information and support was completed by the V-Cat ILS Evaluation and Review Committee in August.
 - A final report that summarized the Committee's findings and recommended the V-Cat consortium stay with its current vendor (Sierra from Innovative Interfaces, Inc.) was presented to the V-Cat Council in September.
 - A formal decision on this recommendation by the V-Cat Council and the WVLS Board of Trustees is on hold pending decisions made within the NICE project.
10. **Investigate cataloging practices of other consortia and compare with WVLS practices. Develop a plan to implement best practices as appropriate.** (Relates to ILS Administration nos. 6, 12, 14-18.) RESULTS:
- WVLS participated in the LSTS 2022/2023 and 2023/2024 improved Discovery Solutions Grants awarded to the Northern Waters Library System to support the Cooperative Cataloging Exploration Project initiated in 2022.
 - AS a part of these grant projects, staff became a member of the Statewide Bibliographic Standards Committee. The goal of this committee is to create minimum standards for bibliographic records in the state.
11. **If applicable, continue to take steps to merge the WVLS/V-Cat library and Northern Waters Library System/NWLN library system databases and respective ILS consortia.** RESULTS:
- An LSTA grant funded joint ILS Exploration project with Northern Waters Library System, named Northern Wisconsin ILS Consortium Exploration (NICE), began in 2022 and will continue in 2024.
 - The exploration is a comprehensive joint project to determine the value and feasibility of a merger between the two Integrated Library Systems implementations and respective ILS consortia.
 - Based on the data and information gathered in 2022-2023, the NICE team determined that an ILS merger is feasible and recommended that NWLS and WVLS pursue a joint ILS and move towards shared practices and policies.
 - In 2024 the NICE Team and targeted workgroups will present a suite of recommendations for an ILS merger including the following:
 - ILS Vendor Selection
 - Delivery
 - Funding Formula and Budget
 - Collaborative Decision Making
 - Hold Fulfillment
 - Record Standards
 - Cataloging Practices
 - Next steps will depend on feedback from the V-Cat Council, Northern Waters Library Network, and approval from the Northern Waters Library Service and Wisconsin Valley Library Service boards.

ADMINISTRATION

2023 ONGOING ACTIVITIES

1. Ensure the library system operates in accordance with Chapter 43 of the *Wisconsin Statutes*. RESULTS:

- Monitored by the WVLS staff and Board of Trustees, along with oversight by DLT's Public Library Development Team, the system's operations remained in compliance with Wis. Stat. 43 throughout 2023.
 - WVLS had one member library that has been in a noncompliance state since 2021, and it is expected that the library will remain in this state until such time that a library director having the requisite 54 college credits for temporary certification is hired. A plan to get the library into compliance was approved by DPI in 2021.
 - It is expected that the library will revert back to a state of compliance in 2024.
2. Ensure the library system operates in compliance with other Wisconsin laws, such as laws relating to open meetings, ethics, and public records. RESULTS:
- The WVLS Board of Trustees effected policies, and staff implemented procedures, to ensure continued compliance with Wisconsin's open meetings, ethics, and public records laws.
 - No issues of noncompliance were discovered or reported in 2023.
3. Ensure the library system operates in compliance with federal laws, such as the Americans with Disabilities Act and the Fair Labor Standards Act. RESULTS:
- Subscriptions to legal and human resource-related listservs and review of the League of Wisconsin Municipalities newsletter kept staff abreast of any changes to state and federal employment laws.
 - Compliance with policies outlined in the *WVLS Employee Handbook* was routinely monitored, and potential conflicts were addressed in a timely manner when necessary.
4. Ensure that all meeting announcements, agendas and minutes are publicly available to all member libraries. RESULTS:
- Agendas for all meetings of the WVLS Board of Trustees, Library Advisory and WVLS/V-Cat Steering Committees, and the V-Cat Council and its subcommittees, were shared with all newspapers in the WVLS seven-county area and posted to the WVLS website. Links to this information were also shared with the DPI Public Library Development Team.
 - All WVLS Board of Trustee meeting agendas and minutes were emailed to member public library directors and board Presidents.
 - The Director's Report, a report that highlights progress on WVLS projects along with regional and state news, was included in the information packet that is shared with the WVLS Board prior to their meetings. This report was further shared with public library directors and area colleagues via email and posted to the WVLS website.
5. Ensure the library system board has written bylaws that outline its purpose and its operational procedures and address conflict-of-interest issues. The bylaws are reviewed at least every three years. RESULTS:
- Draft Bylaws were presented to the WVLS Board of Trustees in November 2021 and approved in February 2022.
6. Ensure the system does not expend more than 20% of the state aid projected to be received in the plan year for administration. RESULTS:
- Expenditures were monitored with each bill run, and monthly expenditure reports were reviewed and approved by the WVLS Board of Trustees during regularly scheduled meetings.
 - End of year expenditure totals for 2022 revealed that WVLS expended less than 11% of its state aid on administrative costs.

- While end of the year totals were not complete when drafting this report, the exact percentage of state aid used for administration was not known. Financial reports through November 2023 indicate funds used for administration will fall well below 20%.
7. Monitor statutory changes and court decisions related to library and system operations and recommend policy changes needed to maintain legal library and/or system operations to the board. RESULTS:
 - WVLS had representation on the Wisconsin Library Association's Library Development and Legislation Committee which closely monitored any potential modifications to state law that could impact Wisconsin's public libraries and systems.
 - Editions of the WLA Newsletter were relayed from WLA to the WLA membership and from WVLS to libraries via the "all subscribers" email list to keep colleagues informed of relevant state and federal legislative news.
 - A legislative report was routinely shared at WVLS Board of Trustees meetings.
 8. Create a long-range plan that addresses the needs of member libraries. RESULTS:
 - WVLS has long-range plans for two major service programs – ILS (V-Cat) Administration and Technology.
 - A LEAN WI Technology Plan was reviewed by the WVLS Board of Trustees and submitted to the DPI Public Library Development Team in 2019.
 - A 2021-2023 V-Cat Strategic Plan was approved by the WVLS Board of Trustees in September 2021, and the V-Cat Council in November 2021.
 - The annual WVLS Plan of Service continued to include goals and priorities for several years beyond the current plan year where necessary.
 9. Offer each WVLS trustee access to a supported computer or tablet. Provide end user support on the use of this technology to access board information in digital form. RESULTS:
 - 2022 was the final year for iPad provisioning to WVLS trustees.
 - Support for iPads already provisioned will continue until they fail or need to be retired due to end-of-life status (i.e. when Apple no longer provides necessary functional and security updates).
 - WVLS shifted to the provisioning and support of laptops for trustees who expressed need during 2023.
 10. Provide current financial and statistical reports for review at each library system board meeting. RESULTS:
 - Monthly financial reports were included in the information packets for all WVLS board meetings in 2023.
 - The 2022 WVLS Staff Report, which included year-end statistical data for 2022, was shared with the WVLS Board of Trustees in February 2023.
 - The January-December 2022 Treasurer's Report, a report that aggregates income and expenses from monthly financial statements, was shared with the WVLS Board of Trustees in February 2023.
 - The 2022 WVLS Annual Report, an aggregate of its financial statements and accomplishments for the year, was shared with the WVLS Board in March 2023.
 - The *2022 System Information and Public Library Statistics* booklet, a compilation of service and financial data from member public library annual reports, was shared with the WVLS Board in May 2023.
 - A *Digital Byte* that summarized the information reported in the booklet and offered tips on how to interpret and use the information presented was shared with the WVLS Board in November 2023.

- Year-end statistical data for 2023 will be shared with the WVLS Board in February 2024.
11. Ensure that the library system board reviews and approves bills at each library system board meeting, in accordance with applicable laws and policies. RESULTS:
- The WVLS Board Treasurer reviewed expenditures/invoices and to co-signed checks for each bi-weekly payroll and bill run.
 - The WVLS Board Treasurer reviewed monthly bank statements and investment information.
 - The monthly “Bills for Approval” and budget reports for WVLS state aid and non-state aid accounts, V-Cat and LEAN WI were reviewed and approved by the WVLS Board of Trustees during regularly scheduled meetings.
 - All financial records were made available to the auditor to complete the 2022 WVLS Audit Report and shared on the WVLS website.
12. Maintain awareness of available grants and other outside funding sources. RESULTS:
- WVLS learned of available grants through staffs’ professional networks – memberships in the Wisconsin Library Association and American Library Association, and system consultant and director meetings with the DPI Library Services Team – and through social media, newsletters, professional journals.
 - Information about grants and links to grant opportunities was shared on the WVLS website.
 - Staff monitored a spreadsheet of available grants that was maintained by the Library Services Team at DPI.
13. Apply for and implement grants from LSTA and other grant sources that benefit the system and its member libraries. RESULTS:
- The **2022/23 LSTA Professional Development Grant** - \$21,717 – supported the 2022 Wild Wisconsin Winter Web Conference and 2023 Spring Webinar series. It also funded the following scholarships:
 - 2022 Association of Rural and Small Libraries (ARSL) Conference (4)
 - 2022 Wisconsin Library Association (WLA) Conference (3)
 - 2023 WI Educational Media and Technology Association (WEMTA) Conference (3)
 - 2023 American Library Association (ALA) Annual Conference (2)
 - The **2023/24 LSTA Professional Development Grant** - \$21,525 - has thus far funded the following scholarships:
 - 2023 WLA Conference (8)
 - 2024 Public Library Association (PLA) Conference (3)
 - Funding from a competitive **2022/2023 LSTA Improved Discovery Solutions Grant** - \$25,000 – launched a Joint ILS Consortium Exploration Project collaboration between WVLS and the Northern Waters Library System in late 2022. The project, named NICE (Northern Wisconsin ILS Consortium Exploration), formed a team of representatives from each of the systems to assist with this project. The outcome of the year-long exploration determined that merging the two integrated library systems was a valuable and feasible endeavor.
 - Funding from a **2023/2024 LSTA Improved Discovery Solutions Grant** - \$50,000 - was awarded to WVLS to facilitate next steps of the Joint ILS Consortium Exploration Project collaboration between WVLS and the Northern Waters Library System toward a merged ILS.
 - With funding from a competitive **2022/2023 LSTA Improved Discovery Solutions Grant** - \$25,000 - awarded to NWLS, a Cooperative Cataloging Exploration Project launched in late 2022. A collaboration of 7 public library systems, this project will develop a report on cataloging practices and opportunities for statewide standardization of bibliographic records.
 - With funding from a **2023/2024 LSTA Improved Discovery Solutions Grant** - \$50,000 - awarded to NWLS, the primary goal of this grant is to continue the foundational work completed during the 2022/2023 grant project. Ultimately, the project plans to establish a statewide bibliographic standards group, provide statewide training on the use of Marc Edit, create a shared repository for the library systems to share documentation, and complete a

comparison analysis of each system's bibliographic records to identify differences. This new project increases the number of participating systems from eight to ten.

- WVLS collaborated with IFLS and NWLS on grant applications on behalf of member libraries across the northern half of the state.
 - Approximately \$309,900 in **Emergency Connectivity Fund** (ECF) support was awarded for three applications, though only one award was utilized. LEAN WI partners leveraged approximately \$56,900 in awarded ECF support to continue data plan subscriptions for the initial batch of ECF supported hotspot devices. Overall utilization and demand for devices and services did not exceed the capacity of the initial batch, so the other awards for two additional applications for more devices and data plans at different service levels were not utilized.
 - The **2022/2023 LSTA Sparsity Aid** allocations (sub-awarded by WI DPI) – LEAN WI partners' aggregate total, \$75,297 - utilized approximately \$49,700 for "purchased services" such as cybersecurity training and testing platform access, continuation of Splashtop Remote licensing for member libraries' staff to use, an upgraded service level required for our helpdesk system, 3rd party patch management integration software for our Microsoft System Center management suite, etc. Approximately \$18,700 was utilized for "non-capital objects" (equipment costing less than \$5,000 per unit), primarily for transport-supporting networking equipment. Approximately \$6,800 was utilized for "indirect costs" shared by each partner system to support grant-related projects and operations.
 - The **2023/2024 LSTA Sparsity Aid** allocation – LEAN WI partners' aggregate total, \$77,028 – will utilize the majority of the grant during the first half of calendar year 2024, though approximately \$3,800 was utilized at the end of 2023 for additional transport-supporting networking equipment.

14. Maintain required statistics for system planning and reports to WVLS Board and DLT. RESULTS:

- This activity was ongoing as evidenced by the information shared in the WVLS Board of Trustees' information packets for meetings, completion of system annual report, data aggregated in the appendices of this document, and annual publication of the *WVLS Statistics* booklet.
- The *2022 System Information and Public Library Statistics* booklet underwent significant revisions to improve layout and design, provide relevant data elements and charts, and include definitions of key measures. The printing of the booklets was outsourced to a local business rather than being done in-house using office printers.

15. Provide for staff and trustee participation in appropriate continuing education activities. RESULTS:

- The 2023 WVLS budget supported staff and trustee participation in a variety of continuing education opportunities held throughout the year.
- Staff members were invited to attend WLA-sponsored activities including the Library Legislative Day in Madison, the Wisconsin Association of Public Libraries (WAPL) Conference held in Oshkosh, the WLA Conference in Middleton, as well as other regional/state/national continuing education and training events relevant to their areas of responsibility.
- WVLS Board members were welcomed to attend WLA-sponsored activities including Library Legislative Day in Madison, the WAPL Conference in Oshkosh, and WLA Conference in Middleton; the American Library Association Conference in Chicago; and WVLS co-sponsored workshops and webinars including the 2023 Wild Wisconsin Winter Web Conference in January and Trustee Training Week in August.

16. Adopts a set of personnel policies outlining the conditions and requirements for employment of system staff, which are consistent with state and federal regulations and relevant court decisions. Ensure the library system board reviews personnel policies on a regular schedule, including after any significant change in employment law. RESULTS:

- Staff reviewed policies throughout the year.
- When appropriate, policy updates were recommended to the WVLS Board of Trustees.
- The following policies were approved by the WVLS Board of Trustees in 2023:
 - WVLS Labor Law Posting; March meeting
 - WVLS Employee Code of Conduct Policy; May meeting
 - WVLS Rest Periods Policy; May meeting
 - WVLS Attendance Policy; May meeting

17. Monitor system property, liability and health insurance needs. RESULTS:

- Insurance needs/costs were monitored monthly and reviewed during the July-September budget development process.
- Property and liability insurance policies were reviewed during the 2022 audit of WVLS financial records.
- Renewals for system property and liability insurance were reviewed and submitted to the insurance carrier in November.

18. Provide for independent audit of WVLS' financial statements and file copy with DPI **by June 1.**
RESULTS:

- KerberRose completed the audit of the WVLS 2022 financial records in May.
- The WVLS Board of Trustees accepted the audit report as presented at its May meeting.
- An electronic audit file was sent to DPI shortly thereafter.

19. Participate in SRLAAW and SOMBAW. RESULTS:

- WVLS was represented at all SRLAAW (System and Resource Library Administrators Association of Wisconsin) and SOMBAW (System Office Managers and Business Administrators of Wisconsin) meetings in 2023.
- Most SOMBAW meetings were held virtually, while SRLAAW meetings offered in-person and virtual options.
- WVLS hosted a SOMBAW meeting in May and co-hosted a SRLAAW meeting with MCPL in August.

20. Maintain and monitor use of reserve funds. RESULTS:

- In March, the WVLS Board of Trustees approved Reserve Account balances: \$175,000 for Resource Development Fund (includes \$15,000 for Computer Equipment) and \$170,000 in the Reserve Fund Balance.
- Funds in reserve accounts may not be used without prior approval of the WVLS Board of Trustees. There were no special requests to withdraw funds from these accounts in 2023.
- A \$100 donation/memorial was made to the WVLS Wessler Scholarship Fund in 2023. According to WVLS policy, transfers of \$100 to the Wessler Scholarship Fund from the WVLS Resource Development Fund may be done automatically and without prior approval from the WVLS Board in memory of a deceased current or former trustee or staff member.

21. Review status/storage of 'old' records in context of the WVLS records retention policy and/or as mandated by applicable legislation. RESULTS:

- 2023 WVLS records were saved (filed, digitized, and archived) in accordance with the updated *WVLS Records Retention Schedule* approved by the WVLS Board in 2019.
- The WVLS Retention Schedule, which aligns with the state's *2017 General Records Retention Schedule*, was subsequently approved by the Wisconsin Public Records Board.

22. Maintain WVLS inventory of office equipment and supplies. RESULTS:

- The WVLS list of fixed assets was updated as outlay items were acquired/disposed for WVLS staff and operations.
 - A detailed list of technology assets was also maintained.
 - The 2022 list was shared with KerberRose in early 2023 to complete the 2022 audit of WVLS financial records.
 - The State of Wisconsin Public Records Board webpage, <https://publicrecordsboard.wi.gov/Pages/Resources/Policies.aspx>, was monitored for updates.
23. Investigate and implement opportunities for reducing costs/staff time needed for materials handling, resource sharing, technology support and office functions. RESULTS:
- WVLS maintained its role in the LEAN WI partnership. This partnership, which included the three northern public library systems – IFLS, NWLS and WVLS – provided significant cost savings in capital maintenance and replacement, and staff resources needed for technology support.
 - A collaboration of the Northern Waters Library Service, IFLS Library system and WVLS offered a unique collection of programming materials to our member libraries. Available, through an online booking system, Lend Items, the collection features memory kits from NWLS, programming and literacy kits from IFLS, and makerspace items from WVLS.
 - To reduce staff time and printing costs, WVLS outsourced the printing of the *2022 System Information and Public Library Statistics* booklet to a local vendor.
 - Efforts continued to further automate data aggregation and report generation processes for monthly and annual report preparation to reduce staff time needed to process data aggregation activities for more efficient reporting.
24. Pursue opportunities to collaborate with libraries and public library systems to improve services and maximize efficiencies. RESULTS:
- The LEAN WI partnership afforded increased technology collaboration between three systems – IFLS, NWLS and WVLS.
 - LEAN WI partners worked together at the end of 2023 to develop and begin the hiring process for a new shared technology service and support role to fortify website hosting platform and site development and management consultation services.
 - The Winding Rivers Library System expressed interest in bringing LEAN WI website service to its member libraries in 2024.
 - WVLS worked collaboratively with IFLS and NWLS on grant applications on behalf of member libraries across the northern half of the state. Examples included: Emergency Connectivity and LSTA grants.
 - WVLS continued its strong partnership with IFLS Youth Services Consultant to draft monthly Starred Reviews for youth materials and provide support and guidance of benefit to member libraries in both systems.
 - A partnership with NWLS provided for the exchange of expertise and enhanced service in the areas of Inclusive Services and Continuing Education and Training.
 - WVLS collaborated with several public library systems across the state to bring continuing education opportunities like the Wild Wisconsin Winter Web Conference, Spring Webinar Series, Trustee Training Week, and Tech Days to member library staff and trustees.
 - A collaboration of the Northern Waters Library Service, IFLS Library system and WVLS offered a unique collection of programming materials to our member libraries. Available, through an online booking system, Lend Items, the collection features memory kits from NWLS, programming and literacy kits from IFLS, and makerspace items from WVLS.
 - With funding from an 2022/2023 LSTA Improved Discovery Solutions Grant, a Joint ILS Consortium Exploration Project collaboration between the Northern Waters Library System and WVLS launched in late 2022 to determine value and feasibility of merging two integrated library systems and respective ILS consortia. The year-long investigation determined that overarching goals of a joint ILS consortium to provide increased ILS administrative support to member libraries and improved service to library users was both desirable and feasible.

- With funding from a 2022/2023 LSTA Improved Discovery Solutions Grant application by NWLS, a Cooperative Cataloging Exploration Project launched in late 2022. This collaboration of WVLS and several other public library systems explored opportunities for statewide standardization of bibliographic records.
- The IFLS Library System invited WVLS and NWLS member libraries to participate in their annual bulk library supply order conducted in March.
- Monthly meetings of public library services consultants from WVLS, Nicolet Federated Library System (NFLS) and Outagamie Waupaca Library System (OWLS) was initiated in late 2023 to learn more about each system's services, priorities and challenges, and to seek ways to collaborate.
- LEAN WI partners continued the practice of consolidating our respective LSTA "Sparsity Award" allocations to be managed as one award primarily for joint use licensing, services, and equipment. This shared project management allows for greater efficiency in overall grant management and for broader, more holistic awareness of our needs, to best utilize the support.

Indicate new or priority activities relating to this requirement for the plan year (2023).

1. Continue participation in DPI-sponsored Public Library System Redesign initiatives. Share updates with WVLS member libraries and trustees as necessary. RESULTS:

- See nos. 23 and 24 above.
- Staff attended DPI-hosted meetings of system directors and consultants, as well as COLAND and LD&L Committee meetings, and were updated on state- and regional- level goals and initiatives that correlate with Public Library System Redesign (PLSR) recommendations.
- Staff served on a DLT-hosted advisory group charged with providing input on pathways to implement the delivery service model developed by the PLSR Delivery Workgroup. Launched in 2021, this work continued in 2023 with meetings held in May, August and September. WVLS member libraries were requested to track delivery amounts for one week in April and November.
- WVLS participated in two LSTA grant projects in 2023 that advanced PLSR recommendations to increase collaboration between public library systems and to create larger units of service. A 2022/2023 LSTA Improved Discovery Solutions Grant awarded to WVLS launched a Joint ILS Consortium project known as NICE (Norther Wisconsin ILS Consortium Exploration) to investigate the desirability and feasibility of merging two integrated library systems. In partnership with several other public library systems, a 2022/2023 LSTA Improved Discovery Solutions Grant awarded NWLS launched a cooperative cataloging exploration project to explore opportunities for statewide standardization of bibliographic records.
- Information on WVLS collaborations was routinely shared with the WVLS Board of Trustees and WVLS community when appropriate.

2. Implement data aggregation processes helpful to WVLS staff and member libraries. RESULTS:

- Database and query improvements were made for monthly circulation reports and DLT Public Library Annual Report statistics.
- To reduce the amount of staff time spent on data aggregation, queries were scripted, tested and implemented to take steps toward full automation monthly circulation reports.
- Staff ran monthly reports of replacement fines paid on behalf of V-Cat consortium members.
- Additional monthly reports were emailed to V-Cat libraries to assist them with regular record clean up.
- Steps toward automating report generation and data visualizations will continue in 2024.
- WVLS was represented on the WPLC Data Dashboard workgroup and the DPI Library Services Data Workgroup to discuss and strategize on data aggregation, data equity, and data literacy across public library systems and public libraries.
- The newly hired WVLS Data and Technology Services Consultant along with peers from public libraries across Wisconsin enrolled in a first-ever WiLS Data Classroom. Goals of the inaugural

program, offered over 6 months from October 2023 - April 2024, are to help participants identify existing library-focused data resources, collect novel data, use data for assessment and evaluation, conduct basic data analysis, and create impactful data visualizations. Details about what was learned from the WILS Data Classroom will be provided to the WVLS Board of Trustees and member libraries in May 2024.

3. Develop WVLS Planning Survey and share with member libraries in the first half of 2023. RESULTS:

- Two extensive surveys from DPI were sent to member libraries in the first half of the year that pre-empted this activity from happening.
 - Member libraries were asked in February to complete a detailed Public Library Staff Compensation Survey as part of a LSTA-funded library staff compensation study.
 - In March, member libraries were asked to complete a Wisconsin Library Facilities Assessment as part of an LSTA grant project to collect and organize information about library facilities that may be used by libraries, library systems and DPI to advocate for improved facilities.
- This activity will be conducted in 2024.

4. **Update WVLS Disaster Plan.** RESULTS:

- The number of LSTA Grant projects WVLS was involved in throughout 2023 required additional meetings and discussions throughout the year. This taxed our ability to focus on this project.
- This activity was included in the 2024 WVLS System Plan the WVLS Board of Trustees approved in September.

Indicate new or priority activities relating to this requirement for the plan year (2024).

1. **Continue participation in DPI-sponsored Public Library System Redesign initiatives. Share updates with WVLS member libraries and trustees as necessary.**
2. Implement data aggregation processes helpful to WVLS staff and member libraries.