

Waupaca County Library Service Plan: 2025-2029

Introduction

Wisconsin counties that participate in public library systems are responsible for providing library services to county residents who reside outside of communities that maintain their own libraries. Because Waupaca County is a member of the Outagamie Waupaca Library System (OWLS), it is required to engage in regular planning to ensure that county residents have access to adequate library services.

While county library service plans can address any appropriate issues, Wisconsin Statutes Section 43.11 requires that the Waupaca County plan address at least the following:

- How public library service will be provided to residents of those municipalities in Waupaca County not maintaining a public library.
- The method and level of funding to be provided by the County in order to implement services described in the plan, including the reimbursement of municipal libraries for providing countywide library service.
- A method for allocating membership on the OWLS Board between Outagamie and Waupaca Counties.

In May 2024, the OWLS Board was appointed to serve as the planning committee, and it developed this plan. A public hearing will be held, and the plan will be presented to the County Board of Supervisors for approval. It is intended for this plan to supersede the Waupaca County Library Service Plan: 2020-2024.

Review of the 2020-2024 County Library Service Plan

The Library Planning Committee's review of library service in Waupaca County indicates that the 2020-2024 Plan has been generally effective. Public libraries in the county have continued to do a good job of making high quality library services available to all residents of the county. They offer great value to the community, are open and welcoming to all, and provide a neutral, safe place for meetings. Participation in OWLS has been good for public libraries and library service in the county, and OWLS has done a good job of coordinating countywide library service. The principles articulated in the 2020-2024 Plan (Appendix B) continue to be valid and have guided the development of this plan.

The 2020-2024 Plan phased in the inclusion of electronic circulation in the funding formula. The decision to revise the formula was based on changes in library service and use due to the increasing availability and high demand for digital resources which allow patrons to make use of library collections without visiting the library building. This trend identified by the planning committee in 2019 has continued over the current plan period.

The COVID-19 pandemic had a profound impact on library service during the plan period. Physical circulation decreased 47% between 2019 and 2020 and then gradually rebounded to reach 71% of 2019 circulation in 2023. Total circulation of OverDrive items in 2019 was equal to approximately 9% of physical material circulation. Between 2019 and 2023, OverDrive circulation increased by 35% to equal approximately 17% of physical circulation. Further growth in electronic circulation has been hindered by the size of the collection. Libraries cannot afford to purchase enough items to meet demand, and waiting lists for popular titles are extremely long.

Because eligible expenditures increased 2% over the plan period, and total combined physical and electronic circulation decreased, Waupaca County libraries' average cost per circulation increased from \$4.21 in 2019 to \$5.69 in 2023.

Circulation to county residents living outside of communities with libraries increased from 42% of total circulation in 2019 to 43% in 2023. During the period covered by the Plan, the County's payments to municipal libraries increased at an average of 2.9% per year.

The 2020-2024 Plan recommended maintaining library funding at 100% of the formula for providing countywide library service, a threshold first achieved in 2014 and successfully maintained through 2024.

Another issue the plan addressed was to encourage the appointment of non-residents to library boards, especially those from the towns making the greatest use of the library. The Fremont and Marion library boards have added county appointments during the plan period. Local libraries were also encouraged to consider including youth members on their boards.

Finally, the committee considered another issue facing some Waupaca County public libraries. Libraries in municipalities located near the county line sometimes provide significant levels of service to residents of other counties, and OWLS regularly works to see that these libraries are compensated for their efforts. In 2022, OWLS initiated billing of Winnebago County on behalf of the Neuschafer Community Library for service provided to Winnebago County residents who reside outside of communities that maintain their own libraries, and in 2023, that billing was extended to include all Waupaca County libraries with eligible circulation.

History of Funding

Because of the switch in funding methodologies that occurred in 2000, libraries were being funded at different percentage levels of the new formula. The 2000-2004 Plan attempted to hold libraries harmless by freezing payments to libraries with higher funding levels and increasing payments to libraries with lower funding levels. While this approach helped, there was still a large variation in funding levels among libraries.

Because it was not equitable for some libraries to be receiving reimbursements at a higher level than other libraries, the County Finance Committee directed that the distribution of funds to libraries be reviewed and that libraries be brought "to equity by the 2007 budget year." Consequently, the 2005-2009 Plan included a funding methodology that was more aggressive in

moving libraries to the same funding percentage, and beginning in 2007, all libraries were funded at the same percentage level (82%) of the county funding formula.

This action required significant cuts in funding to some libraries. In 2005, the Marion library received a cut, and the Fremont, New London, Scandinavia, and Weyauwega libraries did not receive funding increases. In 2006, the Fremont and New London libraries received funding cuts, and the Scandinavia and Weyauwega libraries did not receive increases. In 2007, the New London, Scandinavia, and Weyauwega libraries all received funding cuts.

The biggest challenge for Waupaca County in the 2010 to 2014 Plan was to make better progress toward the goal of reimbursing municipal libraries at 100% of the funding formula for providing countywide public library service. Failure to fully compensate libraries for the county service they provide contributes to disparity in the levels of support for library service between municipalities with libraries and the remainder of the county. A result of receiving less than 100% funding is that municipal residents provide higher levels of support to subsidize the use of their libraries by non-residents.

Beginning in 2010, the budget request contained an amount sufficient to increase the overall funding level by 3% each year in order to fund all libraries at the 100% level by 2014. The 2015-2019 Plan maintained the same formula, and all libraries were funded at 100% for those five years.

The 2020-2024 Plan revised the formula to phase in reimbursement for electronic circulation over the plan period. The libraries were funded at 100% of the formula, subject to the phase-in percentage, for all of the plan years.

Year:	2010	2011	2012	2013	2014-2024
Funding Level:	88%	91%	94%	97%	100%

Rationale for the 2025-2029 Plan

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Recommended Funding Methodology

1. Determine Each Library's Cost of Service
 - a. A library's total operating expenditure in a given year, less capital expenditures, rent, or net lease costs, and expenditures from federal sources, fines, fees, gifts, grants, or donations, is divided by the total number of items loaned (i.e., circulation) during the same year to determine the library's cost per loan.

Electronic circulation will be included as part of the total circulation provided by a library if that library includes an amount in its annual operating budget to purchase or lease items in electronic format.

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An electronic circulation is defined as an individual electronic file, corresponding to a commercial work, cataloged as a distinct resource, and made available for a limited, defined time period on an electronic device. As such “uses” or “hits” of electronic databases or similar files will not be considered “circulation.” In order for an electronic circulation to count for reimbursement, OWLS must be able to obtain data from the content vendor that identifies the user’s municipality.

Commented [BS1]: Based on definition of electronic circulation in the 2023 annual report instructions.

- b. A library’s cost per loan is multiplied by its number of loans to county residents living in jurisdictions that do not maintain libraries to determine the library’s cost of service provided to the county.

2. This plan recommends continuing funding at 100% of the formula.

Commented [BS2]: A phase-in may be recommended if new funding is included in this plan.

3. Determine Each Library’s Payment

- a. Each library’s payment will be determined by multiplying its cost of county service by the funding level for the particular budget year.
- b. Each library’s payment under the county formula will be compared to the statutory minimum funding level for that library. If a library’s funding under the county’s formula is less than the required state minimum, its appropriation will be increased to the required minimum amount.

Deleted: for circulation of physical items and phasing in any change in funding related to electronic circulation at a rate of 20% per year.¶
 Year: 2014-2019 2020 2021 2022 2023 2024¶
 Funding level for physical circ: 100% 100% 100% 100% 100% 100%¶
 Funding level for electronic circ: 0% 20% 40% 60% 80% 100%¶

Commented [BS3]: This is likely where we would include a method to limit volatility if desired.

4. Annually, OWLS will coordinate the budget request process and will submit a budget request equaling the total of the payment amounts for all county libraries.

5. The OWLS Board will monitor the effectiveness of this funding methodology and recommend any changes to Waupaca County. In 2029, this methodology will be evaluated by the next County Library Planning Committee.

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Goals and Objectives

Goal A: To continue membership in OWLS in order to ensure that all residents of Waupaca County have access to all library services provided by all public libraries in the county and library system.

Objectives:

- 1. Waupaca County shall regularly meet all statutory requirements in order to continue its membership in OWLS. (2025-2029)
- 2. Waupaca County shall regularly appoint five members to the OWLS Board in accordance with this plan and with Section 43.19, Wisconsin Statutes. (2025-2029)
- 3. Waupaca County shall designate the OWLS Board to coordinate the implementation of countywide library services. (2025-2029)
- 4. Waupaca County shall encourage all municipal libraries in the county to continue their memberships in OWLS. (2025-2029)

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- 5. OWLS shall continue working with neighboring systems and counties to resolve intersystem service inequities so that Waupaca County libraries are compensated adequately for providing services to residents of other systems. (2025-2029)

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Goal B: To compensate public libraries at 100% of the funding methodology included in this plan for providing service to county residents residing in jurisdictions without local libraries.

Objectives:

- 1. OWLS shall annually collect circulation and expenditure data from municipal public libraries in the county and prepare a library budget request based on the County's funding methodology. (2025-2029)
- 2. OWLS shall annually submit the library budget request to Waupaca County in accordance with county and statutory deadlines. (2025-2029)
- 3. Waupaca County shall annually appropriate funding to compensate municipal libraries for providing services to residents of jurisdictions without local libraries. (2025-2029)
- 4. Waupaca County shall pay its annual library appropriation to OWLS for distribution to the appropriate municipal libraries. (2025-2029)

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Goal C: To engage in continuous planning and education regarding the provision of public library services to Waupaca County residents.

Objectives:

- 1. The OWLS Board shall annually review this plan and shall forward to the County Board any recommended revisions. (2025-2029)
- 2. The County Board shall appoint a library planning committee to revise this plan or develop a new county library service plan whenever warranted. (2025-2029)
- 3. The County Board shall appoint a library planning committee to revise this plan or develop a new county library service plan. (2029)
- 4. OWLS shall annually contact library directors and county officials to inform them of options for appointing non-residents and youth to local library boards and shall encourage them to make such appointments. (2025-2029)
- 5. OWLS shall regularly provide detailed statistical information to all municipal libraries about services provided to residents of all jurisdictions within the county. (2025-2029)
- 6. Waupaca County shall encourage all municipal libraries in the county to regularly share information with town and county officials about library use by their constituents. (2025-2029)

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Appendix A

Waupaca County Planning Committee Members - Appointed May 2024

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Support for Committee

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Appendix B

Guiding Principles

In order to develop a plan, it is necessary to articulate the underlying principles and assumptions that inform and shape the plan. This plan has been developed in the context of the principles and assumptions listed below. These principles are based on statutory requirements, history, or current practices.

1. All Waupaca County residents should have convenient access to high quality library services and should be free to use any public library in the county or library system.
2. Waupaca County should continue to rely on its existing municipal libraries to provide countywide library service. There is no need for the county to implement a new structure to provide additional library services.
3. The county has a responsibility to fairly compensate municipal libraries for providing countywide service.
4. The county should continue to contract with OWLS, and OWLS should continue to contract with the individual municipal libraries to ensure that countywide service is provided.
5. Public libraries within Waupaca County currently provide sufficient access to a high level of services. Any future county library service plans should attempt to preserve this level of access and services.
6. Because municipal libraries are making satisfactory efforts to provide appropriate services, this plan need not recommend any minimum service standards. However, all municipal libraries are encouraged to develop services in accordance with the Wisconsin Public Library Standards.
7. Local library boards have autonomous authority for determining local library service programs. This authority includes a responsibility to plan and deliver local library services in the most cost-effective manner possible.
8. Local libraries have a responsibility to collect and report the circulation and financial data used to determine county budget requests as accurately as possible.
9. Waupaca County encourages municipalities to appoint non-residents to their public library boards so that all county residents are represented in decision-making regarding library policies and operations.