

# Winnefox Library System Technology and Resource Sharing Plan

January 1, 2020 – Dec 31<sup>st</sup> 2025

Approved by the Winnefox system board: November 20<sup>th</sup>, 2019

## General Information

Winnefox Library System  
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## Introduction and Purpose

Our overarching goal is to help our member libraries so that their patrons continue to love and use them. The purpose of Winnefox's Technology and Resource Sharing plan is to be the stage on which our libraries stand when serving their patrons: strong, steady, supportive, unnoticed.

Further introduction and purpose can be found in our mission statement:

<https://www.winnefox.org/mission-statement>

This plan is intended to:

1. Meet the statutory requirements of Wisconsin Statute 43.24(2) that the system undergo planning with *The Division for Libraries, Technology and Community Learning* (DLTCL) and member libraries in regard to library technology and resource sharing
2. Satisfy the requirements of both the Federal E-Rate program and the state TEACH program
3. Provide a blueprint for the continuing evolution of the use of technology in services provided by the Winnefox Library System and its member libraries
4. Guide system efforts to maintain a reputation for excellence in technical support services among our member libraries.

Most technology-related services are part of the member-funded Winnefox Automated Library Services (WALS). This includes the ILS, shared network and file storage, email, and website hosting. 29 of our 30 members participate in WALS.

There are several technology-related services that are available to all Winnefox members such as: locally developed databases for vital records and summer reading program; mobile printing; website design/hosting; training and continuing education; and cooperative purchasing.

## Background

As technology changed and as public expectations of what a library should offer changed, Winnefox rose to the challenge of keeping abreast of these demands. We were one of the early library systems to implement a shared ILS and a shared network. In a time when many libraries were still working on automating individually, we were working on bringing our libraries into a shared system with email and even rudimentary internet access.

From the beginning, the focus was on figuring out how to make shared technology affordable and available to all our libraries. This was especially important to our smaller members with low budgets, busy staff, and almost no tech support resources in their communities. We used LSTA grants to defray costs for our libraries to purchase and install telecommunications equipment, terminals, and requisite building cabling to get them connected to our shared network/ILS. Without BadgerNet, the TEACH program, and the LSTA grants, most of our libraries would not have been able to automate. Many of our rural libraries wouldn't have had broadband access—it either wasn't available or not affordable. The last of our libraries was added to the network and shared ILS in 2006.

Since then we have continued to upgrade and improve the network infrastructure used by the 29 libraries that share it. We have increased network security, added wireless capabilities, and moved many of our libraries, as well as our central site, to higher bandwidth.

We have also continued to improve technology-related services. We have added functionality into the OPAC so that patrons can access Overdrive records, find related resources, and follow their favorite authors. We purchased a mobile app for patrons to access the catalog and their account as well as other electronic resources on their phones. We are constantly upgrading and updating the software used by our member libraries: be it moving to the latest version of Windows, or renovating websites to take advantage of new modules in Drupal.

## Needs and Assets Assessment

### **NEEDS:**

Although specific technologies evolve very rapidly, there are underlying areas and issues which remain constant. For example, the number one need identified in our last Technology Plan is every bit as relevant today as it was in 2013: namely “A need to define and balance needs for traditional and new services.” The difference is that services which were considered “new” in 2013 (like wireless access) are now considered “traditional,” so service goals and activities are constantly being modified.

With that in mind, our service model towards our libraries is guided by overarching principles that our libraries have expressed:

- Balance Needs—
  - between new and traditional services,
  - between small library and large library,
  - between standardization and local control,
  - between centralized and distributed operations
- Training and Information Sharing Needs—
  - of library staff in technologies required to accomplish their jobs
  - of library staff in providing assistance to patrons using personal technologies
  - of library staff in keeping abreast of new trends in library and other technologies
  - of local governments about the importance of library services
  - of trustees about the importance of libraries’ services staying current and implementing new technologies
- Efficiency Needs—
  - to identify ways that technology can streamline workflows
  - to provide behind-the-scenes support services to the libraries so library staff have more time to serve their public.
  - to find more cost-effective solutions through cooperative buying
  - to identify areas which are better managed centrally
- Responsiveness Needs—
  - to solicit and encourage open feedback from member libraries
  - to provide timely answers and solutions to member libraries
  - to maintain sufficient fallback and redundancies to be able to quickly recover from any interruptions of services
  - to maintain the network and server infrastructure at peak levels to prevent impacting library performance rates.

### **ASSETS:**

1) A robust, secure and reliable infrastructure:

a. Network

Over the last 4 years most member libraries’ network equipment have been upgraded or replaced as necessitated by state-wide infrastructure changes, bandwidth upgrades, and network restructuring.

Each library has at least a 50mbps download speed. Three libraries (Oshkosh, Neenah and Menasha) on the Foxnet network have 1000mbps connections. Our 18 libraries using the

Spectrum service have asymmetrical network connections with 60mbps download speed and 8mbps upload speed. Our 8 libraries using TEACH have symmetrical connections of 50mbps

Each library has at least one system-provided Meraki wireless access point with cloud-based control. The libraries pay the yearly fee to maintain the cloud-based control. We provide a wireless printing solution as well.

We contracted with an independent agency to run a security audit. Per their recommendation, we segmented our network to improve security by separating all the publicly-accessible network connections and the staff network connections into two separate VLANs.

We maintain Cisco Smartnet warranties on all critical network equipment. End user devices are purchased with 3-year warranties, but libraries usually keep them for up to 6 years or until they are no longer useful for staff. The software on these computers is patched regularly by Winnefox staff.

b. Servers:

Winnefox maintains four Dell PowerEdge host servers that contain the +/- 20 Virtual Servers used to provide services to the network and to libraries. Each host is purchased with a 24x7 ProSupport Dell 5-year warranty. All hosts, along with the network equipment, are plugged into a UPS to manage power outages and fluctuations.

Each host server is backed up weekly, with monthly backups maintained locally and offsite for 6 months. Off-network backups are kept for a year. In addition, the two file servers and two principal domain controllers are backed up nightly. Backups for those are also maintained for up to a year onsite and offsite.

Some of the services provided by these servers include: ILS, File Storage, Website Hosting, PC Time Management and Security, Anti-Virus and filtering, Print Management, SQL Database Hosting.

2) Staff to support the hardware, software and services provided.

Winnefox employs

- 1 FTE to support the network, servers, PCS, and other connected devices.
- 1 FTE to backup network/server support and develop and maintain library websites.
- 1 FTE to support electronic resources and develop and support local databases.
- 2 FTE to manage and support the ILS
- 1 FTE to coordinate continuing education
- 1 FTE to coordinate ILL services
- 2 FTE to do centralized ordering and processing for member libraries in 3 counties.

Winnefox contracts with Heartland Business Solutions for consulting on network-related services. Winnefox contracts with Oshkosh Public Library for 3 FTEs to provide cataloging and maintenance of bibliographic records.

- 3) Multiple structures built in to solicit feedback, gather input, and provide information from and to member libraries.
  - Monthly County-based Library Advisory Committee meetings.
  - Bi-monthly Technology Advisory Council meetings.
  - ALL-WALS meetings to discuss primarily ILS-related issues 2-3 times per year.
  - Annual system-wide meeting in January.
  - Various email lists to facilitate communications between member libraries.
  - An Extranet to provide a central repository of information, including: training materials, policies, forms, events calendars, and statistics.
- 4) Winnefox is already meeting most of the standards laid out in the *SRLAAW* Creating More Effective Library Systems. That document is appended to the end of this one.

## Infrastructure and Inventories

Each of the 29 libraries in our shared network has a system-provided router and managed switch that connects them to the central network hosted at the Oshkosh Public Library. There are three separate providers among our libraries, Badgernet, Spectrum, and Foxnet, that are integrated into one network through the central location in Oshkosh.

Within the network we have:

- 3 centrally located Active Directory domain controllers that manage approximately
- 580 computers.
- 2 network segments in 29 libraries.
- 4 Dell PowerEdge servers that host
- 20 virtual servers that provide various services to the member libraries.

## Data

Information used in the drafting of this plan was obtained in the following ways:

1. The five county Library Advisory committees discussed library technology needs, issues, and priorities at their regularly scheduled meetings.
2. The Winnefox Technology Executive Council (WTEC) and Winnefox Automated Library Services (WALS) discussed technology needs, issues and priorities at its meetings.
3. Member library staff received draft copies of this plan for review and comment.
4. The Winnefox Library System board of trustees discussed and approved this plan.

Wisconsin Statute requires public library systems to submit a written plan for library technology and resource sharing every five years (Wis. Stat. 43.24(2)(m)). This plan was written to accommodate the timing of this requirement. However, the planners realize that library and information technology exists in

a fluid, rapidly changing environment. A particular technology that may be important in year five of a planning cycle may not be evident in year one. For this reason, this plan will be reviewed and updated each year as part of the annual budgeting/planning process. Information regarding new technologies as well as data from the evaluation process will be used to revise the plan.

## Resource Sharing

Winnefox doesn't have a separate Resource Sharing Plan document. Instead, resource sharing is incorporated each of our various services and programs.

ILS: 29 of 30 Winnefox libraries are part of the shared SirsiDynix Symphony ILS. Patrons from any of these libraries can seamlessly obtain materials from any of these libraries through the shared library catalog. We share access to about 500,000 titles which includes about 1,000,000 individual items. OverDrive titles are also included in the catalog to improve patron access.

Fond du Lac Public Library runs its own SirsiDynix ILS. Fond du Lac patrons may access materials from the rest of the Winnefox libraries through ILL, and vice versa.

ILL: Winnefox provides an ILL clearinghouse in order to facilitate use of ILL by member libraries and patrons with the least amount of work by local library staff.

DELIVERY: Winnefox provides daily Monday - Friday delivery to all member libraries, allowing materials to move between libraries in the fastest possible time. Not only does this encourage resource sharing but ensures the most efficient use of library materials, especially those in high demand.

WAN: Available to the 29 libraries sharing the ILS. Winnefox maintains a secure centralized network that provides the highest possible connection speed to the Internet and network resources given the budget. Services the centralized network provides include:

- Managed Electronic Resources for member libraries
- Managed databases
- Anti-virus
- Mobile Printing for patrons
- File server with daily backups
- Time management for public computers
- Web Filtering
- Website design and hosting
- VPN services for staff working from home

OTHER: Local Databases & forms

Vital records databases, Summer Reading Tracking, and other genealogical/local history indices, are some of the resources developed by Winnefox's Database Application programmer. These are available to all Winnefox libraries.

## Goals, Objectives, and Activities

**GOAL 1: Provide leadership in providing local technology support, improving network infrastructure, and securing library resources and data.**

Objective 1: Provide top-notch technology support so that member libraries' time can be spent elsewhere.

Activity 1.1.1: Centrally manage Windows patches & updates, anti-virus and other shared software.

Activity 1.1.2: Pre-configure new equipment so that libraries need only plug it in.

Activity 1.1.3: Monitor network and server uptime so that we can be working to fix issues before libraries even notice.

Objective 1.2: Maintain and enhance the WALs network infrastructure to ensure that it meets member library needs in a cost-effective manner and is scalable enough to meet changing needs.

Activity 1.2.1: Evaluate whether libraries should use Spectrum or Teach connections.

Activity 1.2.2: Monitor bandwidth usage to determine whether libraries have sufficient capacity at their current rate of service.

Objective 1.3: Protect system resources with an emphasis on network security.

Activity 1.3.1: Do independent vulnerability testing at regular intervals

Activity 1.3.2: Require all staff to complete KnowBe4 training.

Activity 1.3.3: Maintain all PCs, laptops, printers that connect to the network at the most current release.

Activity 1.3.4: Evaluate all switch, router, and firewall configurations periodically to prevent intrusion

**GOAL 2: Provide a modern, affordable, shared ILS and online catalog for Winnefox member libraries.**

Objective 2.1: Maintain ILS and online catalog software at most recent versions.

Activity 2.1.1: Upgrade Symphony at least twice a year, dependent on company release cycles.

Activity 2.1.2: Upgrade catalog at least annually, dependent on company release cycles.

Objective 2.2: Provide 3<sup>rd</sup> party enhancements to the online catalog.

Activity 2.2.1: Investigate alternative sources for cover art in catalog

Activity 2.2.2: Investigate and evaluate other sources for enhanced content, related searches, and social features.

Objective 2.3: Investigate options for streamlining procedures for patrons to share materials between the WALs shared online catalog and Fond du Lac Public Library's online catalog.

Activity 2.3.1: Investigate options for sharing a catalog instance

Objective 2.4: Implement, improve and promote newer ILS products that take advantage of the mobile environment.

Activity 2.4.1: Update, maintain, and promote catalog mobile app.

Activity 2.4.2: Update, promote, and train use of the staff mobile app.

Activity 2.4.3: Maintain and promote text messaging for ILS hold and overdue notices.

**GOAL 3: Provide consulting and training to library staff on technology-related equipment and services.**

Objective 3.1: Provide library staff multiple opportunities to experience or re-connect with new technologies.

Activity 3.1.1: Sponsor or co-sponsor a minimum of six (6) contact hours of technology-related continuing education per year.

Objective 3.2: Organize and host at least two system-wide meetings to inform, update, and train library directors in technologies used within Winnefox.

Activity 3.2.1: Hold ALL-WALS meetings on fifth Tuesdays to update and refresh ILS skills and procedures for library directors and staff.

Objective 3.3: Consult via phone, email or on-site visits to member libraries to assist in the purchase, installation, and configuration of new equipment and services.

Activity 3.3.1: Winnefox staff will work directly with vendors on behalf of member libraries purchasing new equipment or services.

Objective 3.4: Facilitate access to technology-related training materials—both internally and externally produced materials—to member libraries and system staff.

Activity 3.4.1: Provide training and related training materials in a variety of formats—print, video, in-person

Activity 3.4.2: Populate and update the Winnefox Extranet with Winnefox-created training materials.

Activity 3.4.3: Provide links on the Winnefox Extranet to classes, webinars, training materials produced by other institutions

#### **GOAL 4: Develop and support local database/digitization projects.**

Objective 4.1: Support and enhance locally developed databases.

Activity 4.1.1: Support and maintain database for Summer Reading Program Signup

Activity 4.1.2: Support and enhance Vital Records database for participating libraries.

Activity 4.1.3: Develop and maintain database for managing library volunteers

Objective 4.2: Provide support for local digitization projects.

Activity 4.2.1: Consult with members about best practices for local digitization projects

Activity 4.2.2: Assist with providing access to locally digitized content.

Activity 4.2.3: Suggest collaboration opportunities with other agencies for providing access to locally digitized content.

## Activities and Tasks

Winnefox maintains and updates a bi-monthly Technology Project List. While it doesn't include all the routine maintenance activities, it provides direction and accountability for larger projects and activities. This project list is presented and discussed every other month at Winnefox Technology Executive Council (WTEC) meetings. The most current version is attached to this document.

## Budget – Estimated Expenditures

The most current version of the budget can be found here:

<https://www.winnefox.org/sites/default/files/trustee-manual/budgets/2019%20Budget.pdf>

Funding of the shared automation system and technology support remain high priorities for Winnefox. It is recognized by both the system and member libraries that if Winnefox is to provide a full range of services



to its members, member libraries may need to provide funds directly to the system to supplement state aids.

1. The amount of funding member libraries need to contribute toward the cost of technology support from Winnefox depends on the amount of funding available within the Winnefox annual budget to support technology.
2. The amount of funding available from Winnefox to support technology depends on two variables:
  - a) Total funding available to Winnefox including state aids and other sources
  - b) The total cost of all other services provided by Winnefox including mandated services and other services requested by members

Winnefox will actively investigate collaboration with member libraries, other library systems, and/or other public institutions to share the cost of technology and increase benefits to the public whenever possible. Examples of current collaborations include FoxNet fiber optic telecommunications network that includes three libraries in Winnebago County; the Wisconsin Public Library Consortium for collaborative purchasing of Ebooks and licensing downloadable audio and video; and the statewide collaborative shared backup/digitization archives project. Winnefox will also seek grant funds wherever possible.

## Evaluation

The effectiveness of incorporating new technology in Winnefox and member library services will be evaluated through:

1. Having regular discussions of technology issues at county Librarian Advisory Committee meetings, WALS meetings, WTEC meetings, and the annual Winnefox meeting
2. Collection of statistical data such as numbers of users of public Internet workstations, tracking the amount of time each workstation is in use, web site "hits," Ebook circulation, etc.
3. Offering staff technology skill-assessment tools
4. Analyzing anecdotal comments from library users and staff
5. Tracking requests for new services

## Policies

Below are links to various Winnefox and/or WALs policies:

[Member-library expectations](#)

[WALS Principles of Participation](#)

[WALS Terms and Conditions of Service](#)

[Winnefox Continuing Education](#)

[Winnefox Cooperative Technical Services](#)

### Winnefox Technology Project List

| Winnefox Technology Update                              | Status      | Staff               | Notes  |
|---|-------------|---------------------|--|
| <b>November 2019</b>                                    |             |                     |  |
| <b>Done since September 2019</b>                        |             |                     |  |
| Winnefox Technology Plan for State                      | Mostly Done | Karla, Mark, Others | Just needs review by WTEC, others, and Board approval  |
| Symphony Update   | Done        | Karla, Melissa      | There is a new version of the SirsiDynix Symphony software available. Upgrade done Nov 6th.  |
| Fond du Lac's EZProxy/ certificate update               | Done        | Keetra              | Remote Fond du Lac patrons should now have access to NewspaperARCHIVE through a secure EZProxy, branded to match their basic catalog login page.   |
| Web Server Maintenance                                  | Done        | Jay                 | The server software (ISPCConfig) on Xevious that manages the sites was due for an upgrade. PHP on the server is version 7.0, added 7.2 as additional option.   |
| <b>Networking, PC support, and email</b>                |             |                     |  |
| Update File Server to WinSrv2019                        | Pending     | Pete                |  |
| Researching automated software updates for Public PCs   | On Hold     | Pete                | SCCM, PSExec   |
| Start process of upgrading Domain Controllers           | In Process  | Pete                | Mostly done  |
| Moving public computers to Deep Freeze Enterprise       | In Process  | Pete                | 60% of public PCs are on DF standard, Enterprise allows for centralized control  |
| Working with other systems on group backup solutions    | In Process  | Pete                | Funding approved, building now begins  |
| Working with other systems on KnowBe4 training software | In Process  | Pete                | 2nd quarter training at 69%  |
| Exploring moving Spectrum libraries back to TEACH       | Pending     | Pete                | Waiting on quotes from ATT re: PTPL and CMPL   |
| <b>Online catalog</b>                                   |             |                     |  |
| "Forgot My Pin" Function                                | On Hold     | Melissa             | Implement functionality for patrons to reset their own PIN within the catalog should they have forgotten it and be unable to log in, especially after normal library hours; a reset link is emailed to the email they have on file with the library, instructing them to enter a new pin. On hold until an upgrade to Workflows restricts the PIN to 4 numbers |
| Catalog Update (Responsive Design)                      | In Process  | Melissa             | The newest version of the catalog has been officially released by SirsiDynix. This is the version that has full responsive design (as below). Our test instance of the catalog and we are investigating the impact of the changes  |

### Winnefox Technology Project List

|  |            |                         |   |
|--|------------|-------------------------|---|
| <b>Symphony and WorkFlows</b>  |            |                         |   |
| Piloting new Acquisitions software   | In Process | Karla & Melissa & Cindy | After a year of investigating, we believe we can use the new software to handle WCTS Selection Lists, and are asking Cindy from WCTS to focus her testing with the goal of going "live" with the Selection Lists by March 2020. |
| Investigate how to improve Symphony Acquisitions usage   | In Process | Karla, Melissa          | We discovered new options in SD Acquisitions software to hopefully improve efficiency. Will take quite a bit of setup and experimentation, but should be worth it.  |
| <b>Local Database Maintenance</b>  |            |                         |   |
| Create Volunteer database for Fond du Lac, Menasha, Oshkosh  | On hold    | Keetra                  | Application and search screen complete, now working on additional backend functionality.  |
| Create cemetery index database for Berlin  | On hold    | Keetra                  | Was thinking something similar to Oshkosh's index. Berlin has quite a few indexes in Excel. If other libraries are interested, perhaps a combined cemetery index similar to the vital index?                                    |
| Migrate all databases & scripts remaining on Windows Server 2008 / SQL 2012 to Windows Server 2016 / SQL 2017. | In Process | Keetra                  | Windows Server 2008 will be obsolete in 2020.   |
| Learning/evaluating new technologies (C# ASP.NET/SQL, PHP/MySQL) as possible alternative to VB ASP.NET/SQL.    | In Process | Keetra                  | Following advice from a Heartland consultant to move away from VB. Completed intro C# class, PHP/MySQL class in progress. Need to evaluate and decide what will be the best fit as we move forward.                             |
| <b>Website development and support</b>   |            |                         |   |
| Upgrade websites to Drupal 8   | Cancelled  | Jay                     | Drupal 8 isn't a viable replacement for all websites. Instead each website upgrade/overhaul will be assessed to determine the best solution based on functionality required.  |
| Ripon website upgrade  | In Process | Jay                     | Will build with WordPress due to calendar functionality required. Followed with Desiree for feedback on design but she has not had a chance to review it yet.   |
| Campbellsort website upgrade   | In Process | Jay                     | All functionality/features are completed with the exception of the calendar. Working on styling pages.  |
| <b>Other</b>   |            |                         |   |
| Winnefox EZProxy / certificate update  | In process | Keetra                  | Winnefox EZProxy is configured and the certificate is installed. Still working with Badgerlink on finding a URL format that works to deep link to a specific obituary.  |
| New Director Training Organization   | In Process | Karla                   | Pull together all the various training documents, develop checklists and timelines.   |
| New Director Training Content  | In Process | Multiple People         | Creating, updating documents as needed. Creating tutorial videos with Screencast-o-matic.   |

# Winnefox Compliance with SRLAAW's 2013 Wisconsin Public Library System Service Standards

November 2019

## Technology Standards

The library system has a significant role in leadership and training in discovering and implementing new technology, in facilitating technology infrastructure, and in providing local technology support. The library system may provide these services directly to its member libraries with its own staff, or it may contract or collaborate with other library systems or vendors to assist it in meeting these service standards. How technology services are funded may differ from library system to library system. The library system is encouraged to experiment with innovative methods for meeting these service standards.

- ✓ The Library System provides its member libraries with access to technology expertise and technology consulting.
  - Winnefox employs 7 FTE with expertise in various aspects of technology and technology training/consulting.
- ✓ The Library System sponsors or co-sponsors a minimum of six (6) contact hours of technology-related continuing education per year.
  - Winnefox employs 1 FTE dedicated to coordinating and implementing technology-related and other continuing education workshops.
  - Winnefox offers a variety of training and workshops for continuing education, including online conferencing. Winnefox collaborates with other public library systems in offering workshop opportunities. Most of the events provide CE credits for the required Wisconsin librarian certification.
- ✓ The Library System provides a secure Wide Area Network (WAN), with adequate bandwidth, for data communication between member libraries, the system headquarters, and appropriate application servers. The Library System will work with member libraries to determine the most appropriate method of data communication. The Library System continually monitors bandwidth usage by member libraries. The Library System assists member libraries in acquiring supplemental bandwidth when needed.
  - WALS provides Internet access to 29 of its member libraries, including public Internet access, wired and wireless.
  - WALS assists libraries in deciding bandwidth needs and which provider best meets their needs.
  - WALS employs 1 FTE dedicated to managing the WAN and related services.
  - WALS contracts with Heartland Business Solutions for additional consulting and configuration of the WAN.
  - WALS uses FoxNet, the fiber optic community network managed by Winnebago County to provide high-speed telecommunications to Menasha, Neenah and Oshkosh public libraries.

- ✓ The Library System promotes effective cost-sharing by facilitating the hosting and licensing of shared applications and databases used by member libraries.
  - Pharos Internet management software, Papercut mobile printing, PC Security software such as ESET and DeepFreeze, Office 365
  - Some Winnefox libraries license electronic databases in addition to those available through the state's BadgerLink program. Winnefox offers database trials, works with the vendor on pricing, and provides remote authentication and statistics on use. Winnefox also offers training and support.
  - Winnefox has created and supports an electronic resources page for 29 of the library websites. The resource page groups any locally-licensed databases, BadgerLink's state-funded resources, and selected websites. Winnefox provides library users with email support for electronic resources.
  - Winnefox and the member libraries have purchased a collection of electronic books, downloadable audio books, and downloadable video via a Winnefox membership in the Wisconsin Public Library Consortium (WPLC). Records for these materials are included in the WALC catalog. Winnefox provides library users with email support for e-material.
  - Winnefox provides access to all 30 of our libraries to Gale Courses, a collection of over 350 interactive, instructor led courses covering accounting and finance, technology and computer applications, personal enrichment, and more.
  - Winnefox subscribes to NewspaperARCHIVE for our 30 member libraries. It provides access to millions of scanned historical newspaper images dating back to the early 1800s.
- ✓ The Library System provides assistance with and support for essential member library technology services during all hours of library operation.
  - WALC provides assistance with and support for essential member library technology services during most hours of library operation.
- ✓ The Library System technology staff meets with member library technology staff at least once per year to consult and advise on the member libraries' technology infrastructure and technology-related workflow practices.
  - Most member libraries do not have dedicated technology staff. Winnefox and WALC technology staff are in regular contact with member library staff who have a bent towards technology to advise and assist with any technology-related practices.
- ✓ The Library System establishes competency guidelines for member library staff needed to use system-provided technology services. The Library System develops and provides training based upon the assessment of library staff competency levels.
  - WALC has a minimum competencies checklist that all library staff using the ILS need to complete. Some member libraries have their own checklists of other technology-related minimum competencies.
  - WALC contracts with Oshkosh Public Library for most initial ILS training. WCTS provides training in collection development/weeding to its members. WALC staff provide advanced training in ILS use. Other Winnefox staff provide training in non-ILS technology services.
- ✓ The Library System facilitates group purchases of computers, network devices, and other technology-related devices for member libraries in order to promote ownership of state-of-the-art equipment and cost savings.
  - Winnefox participates in the statewide Dell Purchasing agreement to procure computers.
  - WALC also coordinates group purchases of security software, network devices, and other devices.

# Integrated Library System (ILS)

The library system has a responsibility to provide its member libraries with access to an affordable, shared integrated library system (ILS). Participation in a shared ILS is an essential element in each Wisconsin's public library's ability to provide modern and effective library service to its patrons, and the library system plays a key role in ensuring that its member libraries can participate in a shared ILS. The library system may provide an ILS and related services directly to its member libraries with its own staff, or it may contract or collaborate with other library systems or vendors to assist it in meeting these service standards. How a shared ILS is funded may differ from library system to library system. The library system is encouraged to experiment with innovative methods for meeting these service standards.

## Administration and Funding

- ✓ The library system facilitates access to a shared integrated library system (ILS) that meets the needs of the member libraries and their patrons.
  - Winnefox Automated Library Services (WALS) operates a SirsiDynix integrated library system (ILS) using the company's Symphony software and their Enterprise Discovery Layer. Twenty-nine of the Winnefox libraries use the shared automation system. The Fond du Lac Public Library operates its own SirsiDynix Symphony system. WALS is largely member-library funded.
- ✓ The library system supports an online catalog for the public that allows for the discovery of library resources in all formats.
  - Winnefox Automated Library Services (WALS) operates a SirsiDynix integrated library system (ILS) using the company's Symphony software and their Enterprise Discovery Layer. Twenty-nine of the Winnefox libraries use the shared automation system. The Fond du Lac Public Library operates its own SirsiDynix Symphony system. WALS is largely member-library funded.
- ✓ The library system will dedicate staff and fiscal resources in support of and to maintain access to a shared ILS.
  - WALS employs 2 FTE to manage and maintain the ILS and online catalog.
- ✓ The library system and its members create a plan and budget to upgrade and replace ILS equipment and software on a regular schedule.
  - Part of the WALS budget is setting aside funds into capital reserves for ILS replacement
- ✓ The library system prepares an annual program budget that accurately reflects the costs and needs for the ILS.
  - The WALS annual budget includes expenditure details that specifies which monies are for ILS vs Network or other services. The Winnefox budget includes the system's contribution towards WALS and other technology-related services provided to all Winnefox member libraries.
- ✓ Each ILS consortium utilizes a decision-making process that meets the needs of member libraries and the system.
  - Winnefox uses a combination of bi-monthly WTEC meetings and quarterly ALL-WALS meetings to steer the decision-making process.
- ✓ The library system, with input from the member libraries, develops a formula for cost-sharing among member libraries that is clear and equitable.

- Funding of the shared automation system and technology support remain high priorities for Winnefox. It is recognized by both the system and member libraries that if Winnefox is to provide a full range of services to its members, member libraries may need to provide funds directly to the system to supplement state aids.
- The amount of funding member libraries contribute toward the cost of technology support from Winnefox depends on the amount of funding available within the Winnefox annual budget to support technology.
- The amount of funding available from Winnefox to support technology depends on two variables:
  - Total funding available to Winnefox including state aids and other sources
  - The total cost of all other services provided by Winnefox including mandated services and other services requested by members
- The formula for determining each member's portion is based on a library's percentage of usage of the ILS. Usage is determined by taking a statistical snapshot and averaging the number of transactions, and the number of items plus patrons for each library.
- ✓ The library system works with member libraries to produce and maintain standards for ILS use in a shared environment.
  - Winnefox uses a combination of bi-monthly WTEC meetings and quarterly ALL-WALS meetings to determine standards for ILS use.
- ✓ The library system encourages the standardization of rules and procedures among ILS participants.
  - Winnefox encourages the standardization of rules and procedures among libraries when those rules and procedures impact other libraries in the shared system.
- ✓ With input from member libraries, the library system board and staff develop an ILS plan to ensure that the ILS continues to meet the needs of member libraries and their patrons.
  - Winnefox uses a combination of bi-monthly WTEC meetings and ALL-WALS meetings to ensure that the ILS continues to meet the needs of member libraries and their patrons.

## **Database Management**

- ✓ The library system provides an effective and efficient way for member libraries' holdings to be added to the database.
  - WCTS provides centralized purchasing and processing for 19 libraries in Green Lake, Marquette, and Waushara counties which use all of the WCTS services, paid for with county funds. Several libraries in the other Winnefox counties use some of the services with local funds. Non-member libraries add short records in the ILS.
  - WALS contracts with Oshkosh Public Library to overlay all the short records with full records from OCLC so that member libraries do not need to spend time or money on obtaining full bibliographic records.
- ✓ The library system works with member libraries to establish standards and procedures for entering bibliographic and item holding records in accordance with currently accepted library cataloging and classification practices.
  - WALS works with member libraries to train and document established standards for entering brief bibliographic records and item holding records.
  - WALS contracts with Oshkosh Public Library to overlay all the short records with full records from OCLC so that member libraries do not need to spend time or money on obtaining full bibliographic records.

- ✓ The library system ensures access to reports to assist member libraries in managing ILS data.
  - WALs provides member libraries with access, training, and templates for various reports to assist member libraries in routine managing ILS data.
  - WALs staff will provide more complicated reports to member libraries upon request.
- ✓ The library system ensures that bibliographic records, item records, and item status for materials in its database are searchable through standard protocols.
  - WALs ensures that materials are searchable and findable through standard protocols.
- ✓ The library system ensures access to reports to assist member libraries in managing patron, bibliographic, and holdings data.
  - WALs provides member libraries with access, training, and templates for various reports to assist member libraries in all aspects of ILS data.
  - WALs staff will provide more complicated reports to member libraries upon request.

## **Training and Support**

- ✓ The library system ensures that member library staff are properly oriented and trained on ILS procedures and protocols.
  - WALs has a minimum competencies checklist that all library staff using the ILS need to complete.
  - WALs contracts with Oshkosh Public Library for most initial ILS training. WCTS provides training in collection development/weeding to its members. WALs staff provide advanced training in ILS use.
- ✓ The library system supports training of the public in the use of the online catalog.
  - Member libraries train the public in use of the online catalog. WALs staff assists if needed.
- ✓ The library system provides statistical data as required for the DLT Public Library Annual Report, using the standard definitions supplied by the Division.
  - Winnefox provides statistical data and pre-populates the DLT Public Library Annual Report form for all its members.
- ✓ The library system ensures access to statistical reports and provides assistance to member libraries in interpretation of data.
  - WALs provides member libraries with access, training, and templates for various reports to assist member libraries in all aspects of ILS data—including statistics.
- ✓ The library system provides qualified, trained staff devoted to the management and support of the shared ILS.
  - WALs employs 2 FTE to manage and maintain the ILS and online catalog.
  - WALs budgets for ILS staff to attend annual training conferences to hone their ILS skills

## **• Resource Sharing**

- ✓ The library system encourages all member libraries to share individual library collections with as few restrictions as possible.
  - WALs states in its Principles of Participation that “One important purpose of the shared automation system is the access to the combined collection of all of the member libraries. “
- ✓ The library system works with member libraries to provide a method for ensuring that lending between members is equitable.
  - WALs provides reports showing a library’s net lender/net borrower status.



- The library system works with member libraries to evaluate the shared library collection and develop methods to support consortium-wide collection development.
  - Winnefox has long been a proponent of local expertise and collection development to serve the local patron base. We have not worked toward system-wide collection development.

## Collaborative Services Standards

The library system optimizes the services that it provides to its member libraries by collaborating with others. Collaborative services within, between, and/or among systems can result in more and better services at less financial cost and less duplication of effort. The library system is encouraged to experiment with innovative methods for meeting these service standards.

- ✓ The library system actively pursues opportunities to collaborate within, between, and/or among systems in order to maximize efficiencies.
  - Winnefox will actively investigate collaboration with member libraries, other library systems, and/or other public institutions to share the cost of technology and increase benefits to the public whenever possible.
  - Examples of current collaborations not covered below include:
    - Winnefox is part of FoxNet, a Community Area Network providing high-speed fiber optic telecommunications to the county of Winnebago. This includes three of our largest libraries.
    - Winnefox is participating in the statewide collaborative shared backup/digitization archives project.
- ✓ The library system facilitates meetings within, between, and/or among like-minded staff from multiple systems in order to discuss and implement collaborative services.
  - Winnefox participates in the Tech-a-Talka group.
  - Winnefox coordinates the statewide Tech Days workshop series, and promotes attendance at Tech Days East and West.
- ✓ The library system facilitates group purchasing (e.g., library applications, supplies, equipment, downloadable e-resources) within, between, and/or among library systems.
  - Winnefox participates Wisconsin Public Library Consortia for collaborative purchasing of Ebooks and licensing downloadable audio and video.
  - Winnefox is participating in the statewide Dell Purchasing collaboration pilot.
- ✓ The library system plans for continuing education opportunities with other systems in the region or within the state.
  - Winnefox has entered into an agreement with Outagamie-Waupaca, Nicolet, and Manitowoc-Calumet library systems to provide in-service training for member libraries' staff and trustees.
- ✓ The library system encourages and promotes collaborative exchanges with other systems in the same region or within the state that use the same ILS vendor.

- Winnefox and Lakeshores Library System, with the assistance of SirsiDynix, started a SirsiDynix Wisconsin Interest Group (SWIG), which holds an annual meeting. SirsiDynix hosts an email listserv for SWIG to discuss and share topics of interest.
- ✓ The library system gives high priority to collaborative service developments on its state-required annual plan and report.

## Delivery Standards

Because the physical delivery of library materials is an essential element for effective resource sharing, the library system has a responsibility to provide a delivery service that connects libraries within the system and around the state. The library system may provide these services directly to its member libraries with its own staff, or it may contract or collaborate with other library systems or vendors to assist it in meeting these service standards. How delivery services are funded may differ from library system to library system. The library system is encouraged to experiment with innovative methods for meeting these service standards.

- ✓ The library system makes local delivery service available to member libraries at least five days per week.
  - Winnefox provides physical delivery of materials 5 days a week to each member library.
- ✓ The delivery service schedule, operational functions, and procedures will be based upon the needs of the member libraries; the cost-effectiveness for the library system; the proper handling and protection of materials being transported; and the safety of system, library and contracted staff handling delivery.
  - In order to ensure proper handling and protection of materials, Winnefox manages and staffs its own delivery service.
  - Winnefox owns and operates three vans.
  - Winnefox organizes the delivery routes to optimize efficiency and reduce travel time and mileage.
- ✓ The library system ensures that, within the system, material placed in delivery by a library shall be delivered to its destination library by the third business day, excluding weekends.
- ✓ The library system connects its local delivery service with the statewide library delivery network.
  - Winnefox connects with the statewide library delivery network in Oshkosh's Public library where all Winnefox deliveries also get sorted.
- ✓ The library system trains member library staff in effective and efficient methods for labeling and packing materials.
- ✓ The library system configures its Integrated Library System, whenever possible, to expedite delivery of materials requested by patrons.
- ✓ The library system will minimally perform two delivery volume studies per year. These studies will count either tote or item volume dropped off and picked up at each member library during the course of one full week.
- The library system encourages nonpublic libraries to participate in delivery networks offered through the system and the state.

# Interlibrary Loan Standards

Wisconsin's public library systems recognize that the sharing of material between libraries is an integral and vital element in the provision of library service and believe it to be in the public interest to encourage such exchanges. Interlibrary loan (ILL) is intended to complement local collections, and should not be used as a substitute for good library collections which meet the routine needs of users. **While ILL can be defined as any exchange of materials between libraries, this standard is intended to address only those exchanges that occur outside of a shared ILS.**

The effectiveness of the state's interlibrary loan system depends upon participation of public library systems, and libraries of all types and sizes, and rests on the belief that no library, no matter how large or well supported, is self-sufficient in today's world. While it is evident that some libraries are net borrowers (borrow more than they lend) and others are net lenders (lend more than they borrow), the system also rests on the belief that all libraries should be willing to lend if they are willing to borrow. *(Adapted from the Interlibrary Loan Code for the United States.)*

The library system has a responsibility to provide its member libraries with access to an effective ILL service that facilitates resource sharing with other libraries. The library system may provide ILL services directly to its member libraries with its own staff, or it may contract or collaborate with other library systems or vendors to assist it in meeting these service standards. The library system is encouraged to experiment with innovative methods for meeting these service standards.

## Participation

- ✓ The library system encourages all member libraries to participate fully in interlibrary loan as lenders and borrowers.
  - All Winnefox libraries participate in interlibrary loan.
- ✓ The library system encourages all participating ILL libraries to follow interlibrary loan procedures and protocols established by the system, RL&LL and/or OCLC.
  - Winnefox provides interlibrary loan (ILL) services that utilize both Winnefox-designed web ILL forms and OCLC ILL software to transmit requests from member libraries to the Winnefox ILL office/clearing house. OCLC ILL software is used to transmit and receive requests to non-Winnefox libraries.
- ✓ The library system ensures that patron-initiated interlibrary loan requests are mediated.
- ✓ The library system ensures and advocates for the confidentiality of the user.
- ✓ The library system supports efficient two-way communication/linking between and among local (system) consortia, state, and national ILL networks.

## Training

- ✓ The library system provides training on creating and managing interlibrary loan requests.
- ✓ The library system participates in/attends all DPI-sponsored meetings for systems and shares what is learned with area ILL colleagues.
  - There hasn't been an ILL meeting for just systems in some time. Winnefox does attend meetings that are specific to only WISCAT.
- ✓ The library system promotes educational opportunities related to interlibrary loan and encourages participation.

- The education opportunities relate to WISCAT which we don't use. Winnefox provides training materials on the extranet for our libraries to refer to and encourages them to contact us with any questions.
- ✓ The library system promotes webinars which provide training on resources available through BadgerLink and encourages participation.
  - Winnefox sends out announcements and links to webinars to facilitate training on BadgerLink resources.
- The library system provides an annual workshop on interlibrary library loan to clarify and review best/current practices, protocols, and procedures.
  - Winnefox sends emails or physical materials via delivery that review these topics as needed.

## **Communication**

- ✓ The library system encourages all member libraries to subscribe to appropriate interlibrary loan communication channels.
  - The statewide list is focused on WISCAT mostly. Winnefox forwards any non-WISCAT-specific communications that apply to our libraries.
- ✓ The library system ensures that participants have access to accurate ILL statistics. Libraries keep their own ILL statistics for their annual reports.
  - Winnefox keeps statistics on number of items requested, how many were filled (whether they come from in state or out) and unfilled if a library wants that information.
- The library system ensures that area libraries receive promotional materials about resources/information available about interlibrary loan best practices, standards, etc.
  - Since Winnefox acts as the clearinghouse for ILL, member libraries do not need a lot of information about ILL best practices and standards.

## **Innovation / Future**

- ✓ The library system explores nontraditional ILL practices, such as direct-to-user-delivery and purchase/print-on-demand options to ensure maximum and efficient accessibility and convenience.
  - Winnefox does ILL differently from most systems in the state. We operate as a clearinghouse to free our libraries to spend more time serving their patrons in other areas. We do keep an eye on different software options but cost is always an issue.