

WISCONSIN PUBLIC LIBRARY SYSTEMS

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Library services in Wisconsin are organized and administered in three tiers by: local governments, library systems, and the state's Department of Public Instruction, Division of Library Services (DLS). At the local level, counties and municipalities provide library services. The next tier of library service is the library system: an organization which coordinates library services in a specific geographic region. The final administrative component of library services is the Division of Library Services. The Division is responsible for developing broad statewide library standards and administering state aid to library systems.

Local Library Services

Local units of government plan for and provide library services. There are currently 373 local public libraries. The initial stage of statewide library service planning begins at the county level with the formation of county library planning committees. These committees are established in each county and are appointed by the county board. Committees are composed of seven to 15 members who are residents of the county. Membership must reflect the county population distribution and include representatives of existing public libraries and one county board member. Appointments are for three years. If, however, there is an existing library board that administers or coordinates present countywide library services, that board will serve as the planning committee.

The committees are statutorily charged with three responsibilities:

1. To investigate county library services and prepare a plan to coordinate services on a county and/or multi-county basis.
2. To submit a final plan, containing copies of any written agreements necessary to implement the plan, to the county board(s) and DLS for approval. Plans for multi-county service must include a method for allocating library system board membership among member countries. (Library Systems are discussed in the following section.)
3. To include in the final plan a provision that extends library services to residents of the county not served by a public library.

Thus, it is the planning committee's mission to develop countywide library services. County library planning committees are dissolved after three years or after a final plan is approved by the county board(s) and DLS. After the planning committees are dissolved, local library services are administered in accordance with the plan. Currently, only one county library planning committee exists (Florence County).

By statute, there are two organizational forms a planning committee can use when organizing countywide library services: consolidated or federated. Consolidated service means that each library in the county is a branch of a main county resource library. Counties organized in this manner have one countywide library board which governs all libraries. By contrast, federated

county libraries are not branches of a main county library, but are independent: each has its own governing board. In counties with federated services, however, libraries are associated and coordinate borrowing, sharing of resources and allow any county resident to borrow materials from any library in the county.

Most countywide library services are provided by municipal libraries. These libraries are governed by local library boards and receive funding from municipal governments. Local library services may also be provided to county residents by contracts between municipal libraries and library systems. Where there are no municipal libraries, county governments provide library services or contract for such services.

Library Systems

As stated previously, the county library planning committee's major task is to organize the libraries in the county. The outcome of the committee's work are public library systems. Library systems coordinate the efforts of and promote resource sharing among local libraries, provide library services in areas not otherwise served, and provide special services and programs not provided by local libraries (municipal or county). The first four public library systems in Wisconsin began operating in 1973. It was the intent of Chapter 152, Laws of 1971, which created public library systems and provided state funding to support these systems, that state aid funds be used for coordination and supplementation of services beyond what could be provided by local and county funds.

Library systems can be organized on a county or multi-county basis. In order to form a single county system, a county must contain a city with a population of at least 30,000 and have a total population of at least 85,000. If it does not qualify as a single-county system, the multi-system which it joins must have a city with at least 30,000 population unless specifically exempted from the requirement. (Only one library system, the Southwest Wisconsin Library System, is exempted.)

Section 43.24 (2) of the statutes identifies the service criteria that must be met by public library systems in order to be eligible for state aid. When a public library system is fully developed (by the end of its third year of operation), it is required to provide the following services:

1. Interloan of library materials among all participating public libraries;
2. Complete library services, including reference and referral services, at the headquarters library to all residents of the system;
3. Honoring of a systemwide borrower's card or valid borrower's cards from all libraries within the system;
4. In-service training for library personnel within the system;
5. Regular delivery and communication systems for participating libraries;

6. Service agreements with all adjacent library systems;
7. Professional consultant services to participating public libraries and counties;
8. Cooperation with other types of libraries (such as college, university, and private facilities) in the system area; and,
9. Continuous planning with the state's division of library services, participating public libraries and counties in the system in regards to developing library materials collection, providing services to users with special needs, developing further cooperative activities with all types of libraries in the system, and improving automation and technical services.

There are currently 17 library systems in Wisconsin (see Appendix). These systems serve all counties, except Florence, which has not yet formally joined a system. The services each system provides are based on particular systemwide needs and vary greatly between systems. For example, some systems provide actual library services (through use of bookmobiles). Others concentrate on providing consulting services for member libraries especially in the area of computer automation. All library systems, though, serve as coordinating bodies for borrowing of library materials for system member libraries.

Library systems do not oversee the administration of local libraries. This is the responsibility of local library boards. Systems serve as coordinating bodies for library services in specific geographic regions. If a county provides library services for individuals not served by a local library, it may provide the service directly, contract with a municipal library to provide the service or have the system contract with a municipal library for the service. In any case, the system itself does not provide the services, though it may coordinate services between libraries and within a county.

The organization of library systems consists of two elements. First, a system can be either a single county or an association of geographically related counties as long as the state library standards (discussed above) are met. Second, a library system, can be organized in a federated or consolidated manner. A federated system (either single or multi-county) has a central resource (headquarters) library but all local library boards retain responsibility for their public libraries. [Within a federated system, individual counties may have library services organized in a consolidated manner but still be members of the federated system.] Consolidated systems, however, may only be single counties. There currently are no consolidated systems. Library systems (either federated or consolidated) that lie within a single county are considered a county agency. A multi-county system is considered a joint agency of all participating counties, but constitutes a separate legal entity. All have systemwide governing boards.

Single county consolidated or federated systems have boards consisting of seven members. Members are appointed by the county board and serve staggered, three-year terms. In multi-county systems, governing boards have 15 to 20 members. Appointments to multi-county system boards are made by the involved county boards acting jointly with appointments in proportion to

population distribution and at least one system board member from each county. These members also serve staggered, three-year terms.

To provide services, library systems rely on two primary sources of funds: state aid and county appropriations. Library systems also receive funding from the federal government (in the form of grants for specific projects), contract income and other sources. Contract monies are most often from other systems or the counties for providing services (such as access to library services). Other sources include state aid carry-over, interest earnings and gifts, grants and endowment income. Funding for Wisconsin's 17 library systems for 1987 are summarized in Table I.

TABLE I
Library System Funding
1987

<u>System</u>	<u>County</u>	<u>Contract</u>	<u>State</u>	<u>FED</u>	<u>Other</u>	<u>Total</u>
Arrowhead	\$268,000	\$0	\$226,627	\$124,941	\$22,203	\$641,771
Eastern Shores	363,048	0	304,343	10,791	38,347	716,529
Indianhead	0	0	600,796	45,187	91,521	737,504
Kenosha	180,509	0	181,999	0	6,513	369,021
Lakeshore	514,267	26,519	327,288	5,279	75,349	948,702
Manitowoc- Calumet	0	21,713	164,320	20,261	8,172	214,466
Mid-Wisconsin	0	500	486,987	30,126	47,120	564,733
Milwaukee	50,000	41,840	1,623,817	31,000	411,922	2,158,579
Nicolet	0	0	564,971	62,353	122,194	749,518
Northern Waters	144,540	0	307,418	46,511	42,048	540,517
Outagamie- Waupaca	0	24,346	284,580	18,088	62,483	389,497
South Central	0	294,089	758,265	15,089	269,479	1,336,922
Southwest	132,263	14,118	203,145	708	12,349	362,583
Waukesha	563,548	8,140	408,172	35,158	31,468	1,046,486
Winding Rivers	146,199	0	409,448	74,738	45,962	676,347
Winnefox	616,820	32,379	324,793	57,320	236,612	1,267,924
Wisconsin Valley	<u>35,270</u>	<u>0</u>	<u>712,631</u>	<u>44,593</u>	<u>121,302</u>	<u>913,796</u>
Total	3,014,464	\$463,644	\$7,889,600	\$622,143	\$1,645,044	\$13,634,895
% of Total	22.1%	3.4%	57.8%	4.6%	12.1%	100.0%

While the statutes define a clear role for counties with respect to organizing and establishing a system, and require that counties support library services financially, they do not stipulate the level of support which counties must provide to libraries (beyond a maintenance of effort provision which states that counties must maintain support for library services at a level not lower than the average of the previous three years), nor do they define the financial relationship between counties and public library systems. In about 65% of the systems, member counties pay the system

directly to provide library services to county residents who do not have access to municipal libraries. The budgets of these systems include both county and state funds. In the other systems, member counties generally choose to purchase library services directly from a municipal library in the county or to provide services themselves. The budgets of these systems consist primarily of state aid and do not include county funds.

Division of Library Services (DLS)

The Division of Library Services in the Department of Public Instruction is responsible for administering state library law and distributing state library system aid. The DLS provides: (1) continuing education programs for librarians; (2) assistance to libraries in personnel recruiting; (3) professional and technical services; (4) statistical reports on statewide library service; (5) library standards; (6) certification for public librarians; (7) approval for the establishment of library systems; (8) reference and loan services to supplement those of other types of libraries in the state; (9) implementation of programs and policies as directed by the state superintendent; and (10) federal library aids. In addition to these programmatic requirements, DLS also distributes state library aid in accordance with statutory provisions.

Section 43.24 of the statutes authorizes state aid for the operation and maintenance of public library systems. The library aid formula is a two-tiered formula, consisting of one calculation which determines the total level of aid appropriated and a second series of calculations which determine the distribution of aid. The amount of aid generated under the formula is targetted at 13% of the prior year's total operating expenditures from local and county sources for public library services in the territories within all the systems in the state. An individual system's funding is determined by taking a ratio of the system's factors (as determined by the three-factor distribution formula described below) to the total factors of all library systems within the state, and multiplying this total ratio by the total library systems aid appropriation.

Under the distribution formula, aid to each system is distributed according to: system area, local expenditures for library services and system population. The following factors for each system are summed: (a) \$6 for each square mile of territory in a single county system, or \$18 in a system containing two or more counties; and (b) 4% of total local expenditures within the system from county and municipal sources in the preceding year for public library services. These factors are summed for all systems and subtracted from the total amount appropriated to library system aid. The difference between the appropriated amount and the sum of the factors is divided by the total number of persons in all systems to arrive at a remaining appropriation per person in all systems. The total amount of aid per system is derived by multiplying the per person amount, about \$0.96 in 1987-88, by the number of persons in each system and adding it to the territory and local expenditure factors for each system.

Table II shows the 1987-88 state aid entitlements (paid for calendar year 1988 operations) for each of the 17 public library systems, as well as the factors used in calculating these entitlements.

TABLE II

1988 State Aid to Public Library Systems

<u>Library System*</u>	<u>Area</u>	<u>1987 Expenditures</u>	<u>1987 Population</u>	<u>1988 Area Factor</u>	<u>1988 Expenditure Factor</u>	<u>1988 Population Factor</u>	<u>1988 Aid</u>
Arrowhead(1)	724	\$2,471,312	139,275	\$4,344	\$98,852	\$134,136	\$237,333
Eastern Shores(2)	750	3,375,370	171,179	13,500	135,011	164,863	313,374
Indianhead(10)	7,991	3,732,490	368,567	143,838	149,300	354,969	648,106
Kenosha(1)	273	1,868,544	121,553	1,638	74,742	117,068	193,448
Lakeshores(2)	887	2,823,641	233,802	15,966	112,946	225,176	354,088
Manitowoc-Calumet(2)	919	1,363,717	108,476	16,542	54,549	104,474	175,564
Mid-Wisconsin(4)	2,608	4,058,638	331,680	46,944	162,346	319,443	528,732
Milwaukee(1)	241	19,053,951	932,432	1,446	762,158	898,030	1,661,634
Nicolet(7)	5,012	4,363,476	348,873	90,216	174,539	336,001	600,756
Northern Waters(8)	8,321	1,164,144	138,873	149,778	46,566	133,134	329,478
Outagamie Waupaca(2)	1,397	2,433,438	188,878	25,146	97,337	181,909	304,393
South Central(4)	3,397	7,520,097	462,852	61,146	300,804	445,775	807,725
Southwest(5)	3,689	888,116	122,360	66,402	35,525	117,845	219,772
Waukesha(1)	554	4,077,283	288,903	3,324	163,091	278,244	444,659
Winding Rivers(7)	5,376	2,752,786	238,276	96,768	110,111	229,485	436,364
Winnefox(4)	1,888	3,047,887	189,338	33,984	121,915	182,352	338,252
Wisconsin Valley(10)	9,911	4,789,452	405,819	178,398	191,578	390,846	760,822
Total	53,938	\$69,784,242	4,790,497	\$949,380	\$2,791,371	\$4,613,750	\$8,354,500

*The number in parentheses after each library system name indicates the number of counties in each system.

In order for a public library system to be eligible for state aid, it must be able to demonstrate that the counties and other municipalities within the system provide adequate financial or other support which, when added to the system's state aid, is sufficient to maintain public library service in the system area in accordance with standards established by the Division for Library Services. This level of support must be maintained: counties and municipalities are not allowed to reduce their spending for local libraries to a level lower than the average of the last three years.

Funding Sources for All Public Libraries and Public Library Systems

State funds go directly to public library systems and are intended to fund system services permitted by statute. Such services include interlibrary loan, reference referral, consulting, continuing education, services to users with special needs, resource library services, collection development, and multi-type library cooperation. However, there is no requirement that state aid be used exclusively for statutorily required services. System boards have the authority to develop programs which meet area needs and to support these programs with state funds.

Local municipal funds support the costs of providing basic library services at a municipal library to residents who pay taxes for library services. These funds are generally used for construction and maintenance of facilities, personnel, purchase of materials of all kinds, and support of circulation, reference, and other programming as determined by a locally-appointed library board.

A county board may provide funds to individual municipal libraries or to public library systems. County funds are most commonly used to provide library service or access to it for county residents not residing in a city, village, or town which operates its own library. Counties often reimburse existing libraries for use by nonresidents, or they may directly provide bookmobile service, books-by-mail service, or any other service as determined by the county library board or county board. Six counties operate consolidated library services, which provide library service on a countywide basis.

The fourth source of public support for libraries and library systems are federal funds. Federal grants are used for a variety of purposes, such as collection development, services to special user groups such as the elderly or Native Americans, the purchase of special equipment and cooperative projects including resource sharing.

In addition to the public funding, libraries and library systems receive income from endowments and gifts, interest on investments and contracts for services. The following table shows operating income which was reported for calendar year 1987 by public libraries and library systems in the state.

1987 Operating Income
Wisconsin Public Library Services

	<u>Amount</u> <u>(in millions)</u>	<u>Percent</u>
Local municipal appropriations	\$53.9	64.2%
County appropriations	13.7	16.3
State aid to public library systems	7.9	9.4
Federal grants	0.9	1.0
Contract income*	0.4	0.5
Endowments, gifts and other income	<u>7.2</u>	<u>8.6</u>
	\$84.0	100.0%

*An estimated two-thirds of the contract income represents income which is already accounted for in another category. For example, if a county appropriates funds to purchase services from a municipal library, these funds could be reported both as an appropriation by the county which makes the expenditure and as contract income by the municipality which provides the service.

APPENDIX

Wisconsin Public Library Systems--1989

<u>System</u>	<u>Member Counties</u>
Arrowhead Library System	Rock
Eastern Shore Library System	Ozaukee, Sheboygan
Indianhead Federated Library System	Barron, Chippewa, Dunn, Eau Claire, Pepin, Pierce, Polk, Price, Rusk, St. Croix
Kenosha County Library System	Kenosha
Lakeshores Library System	Racine, Walworth
Manitowoc-Calumet Library System	Calumet, Manitowoc
Mid-Wisconsin Federated Library System	Dodge, Fond du Lac, Jefferson, Washington, City of Whitewater
Milwaukee County Federated Library System	Milwaukee
Menominee Federated Library System	Brown, Door, Kewaunee, Marinette, Menominee, Oconto, Shawano
Northwest Wisconsin Library System	Ashland, Bayfield, Burnett, Douglas, Iron, Sawyer, Vilas, Washburn
Outagamie Waupaca Library System	Outagamie, Waupaca
South Central Library System	Columbia, Dane, Green, Sauk
Southwest Wisconsin Library System	Crawford, Grant, Iowa, Lafayette, Richland
Waukesha County Federated Library System	Waukesha
Winding Rivers Library System	Buffalo, Jackson, Juneau, LaCrosse, Monroe, Trempealeau, Vernon
Winnefox Library System	Green Lake, Waushara, Winnebago, Marquette
Wisconsin Valley Library Service	Adams, Clark, Forest, Langlade, Lincoln, Marathon, Oneida, Portage, Taylor, Wood