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### **Agenda**

**Pauline Haass Public Library Board of Trustees  
Wednesday, January 19, 2022, 6:30 p.m.  
Library's Quad/Graphics Meeting Room, off lobby**

- 1) Roll call
- 2) Consideration of, and possible action on, minutes of December 15, 2021 Board meeting
- 3) Comments from citizens present
- 4) Communications received by Board members or Director
- 5) Financial report
- 6) Action on bills
- 7) Director's report on library services, legislative issues, staffing, funding, system services, continuing education, building issues, library users, technology, planning, Friends of the Library and Foundation activities, legal issues, and budget.
- 8) New Business:
  - a) Space Needs and Facility Study updates: discussion
  - b) Draft Waukesha County Library Services Plan 2022-2026: discussion
- 9) Items for future agendas: discussion
- 10) Adjournment

**Lisa Bougie, President**

Adele Loria, Library Director

Attendees: Please note that, upon reasonable notice, efforts will be made to accommodate the needs of disabled individuals through appropriate aids and services. For additional information or to request this service, contact Adele Loria at 262-246-5180.

Minutes of December 15, 2021 Board meeting  
Pauline Haass Public Library

Called to order: 6:32 p.m.

Roll call: Bougie, Carran, DeLonge, Hacker, Jilling, Roubik, Schultz, Vande Hei, Wegner, Zoellick present. Also present: Adele Loria, Library Director. Absent: Kojis.

Bougie; Vande Hei motion to accept minutes of November 17, 2021 Board meeting as presented and December 9, 2021 Personnel Committee meeting; motion carried.

Comments from citizens present: none.

Communications received by Board members or Director: none.

Financial report: Revenue and Expenditure Guidelines for November 2021 accepted as presented by Vande Hei/Wegner motion; motion carried.

Prepaid bills in the amount of \$2,485.00, P-Card bills in the amount of \$2,324.60 December 2021 bills in the amount of \$7,492.66, and November 2021 expenses in the amount of \$69,337.98 approved by Vande Hei/Carran motion; motion carried.

Director's report: Loria reviewed the items in her written report and other items as followed by agenda.

New Business: Bougie/Carran motion to convene into Closed Session at 6:45 p.m. pursuant to Wisconsin Statute 19.85(1)(c) *Considering employment, promotion, compensation or performance evaluation data of any public employee over which the governmental body has jurisdiction or exercises responsibility*, with respect to performance evaluation and compensation for Library Director. Roll call vote: Bougie – aye, Carran – aye, DeLonge – aye, Hacker – aye, Jilling – aye, Roubik – aye, Schultz – aye, Vande Hei – aye, Wegner – aye, Zoellick – aye. Motion carried.

Reconvened in open session at 7:02 p.m. by Carran/Jilling.

Bougie/Schultz consideration and possible action on items requiring action arising out of the closed session and motion carried to provide a 3% salary increase for the Library Director.

Final 2022 budget: discussion and action on revised 2022 budget reflecting Village of Sussex contribution accepted as presented by Bougie/Carran; motion carried.

Space Needs and Facility Study updates: discussion; no action.

Board members discussed the Home Delivery Policy update; accepted as presented by Vande Hei/Schultz; motion carried.

Following review, Carran/DeLonge motion to add fundraising research to the 2022 Strategic Plan Activities; Carran/DeLonge accepted with the addition discussed.

Meeting adjourned at 8:09 p.m. by Zoellick/Wegner motion.

Respectfully submitted,  
Adele Loria  
Library Director

Minutes prepared by Lisa Ponto, Administrative Services Manager

**January 19, 2021**

**Director's Report to Library Board**

If anyone would like to attend remotely this month, please let me know by Tuesday afternoon, and I'll set up a Zoom link.

**Agenda Items**

**Space Needs and Facility Study Updates:** Buckle up, because there is a lot of information this month! In December I had multiple meetings with the team from FEH to work on revising and refining our space needs summary. While in most cases the square footage of an area is dictated by data like the service population or the number of items in the collection, there were instances where it needed to be customized to fit our particular circumstances. For instance, we decreased the amount of adult casual seating because we felt the recommended number was high in comparison with our usage patterns, and increased the children's casual seating based on the large number of families we see inside the library throughout the day. Enclosed in your packets is the revised space needs summary, which proposes a facility size of 37,399 GSF (gross square feet).

Also enclosed is the comparison chart that I requested from FEH showing the current square footage allotted to each area along with the recommended square footage based on the current population and the proposed square footage based on the projected 2041 population. This data helps to make the point that in some areas, we are already undersized – something that is common knowledge to staff and trustees but less visible to the public.

After several weeks of preparing and marketing through as many channels as we could (Facebook, website, email, signage around the library, bookmarks distributed at checkout), we hosted the SPARK Sessions with FEH on Thursday, January 13 and Friday, January 14. I heard from a number of people who couldn't attend for COVID-related reasons, but we still had a steady stream of visitors throughout the day both days, and had a moderate turnout (both in-person and virtual) for the evening meetings. There was a great deal of discussion and many ideas generated throughout the process. You can see all of the designs on the FEH SPARKS website: <https://fehdesignsparks.com/pauline-haass-public-library/>. This site will remain open with the option to provide comments and feedback at least until the January 31 ATF meeting (scroll to the end of the designs and click the "provide comments" button).

The first day of the sessions was more open-ended, with a large array of designs. At that distance, choosing a design would be based largely on your preference for new versus renovated, whether you want the library to consider acquiring neighboring properties, and

whether you prefer a one-story or two-story building. Based on interest from participants and staff, FEH worked on refining and expanding as many of these designs as possible. These refined designs allowed participants to evaluate general layouts and consider where various departments (children's, adult, teen, circulation) and features (meeting rooms, program areas, book drops) would work best.

During the second day FEH refined the designs further and worked to attach cost estimates to the various projects. These estimates are just those, and obviously not a substitute for actual bids in terms of assessing costs. They are, however, very thorough estimates, taking into account not just construction and site costs but many of the "soft" costs that building projects entail such as moving, legal fees, furniture, IT upgrades and much more. These estimates provided an idea of the capital costs involved for each project.

Over the next couple of weeks I will be working with FEH to determine the differences in operating budget costs for the various designs, since that's another important factor for participants to consider. Additional floors or multiple entrances have staffing implications that will affect the operating budget dramatically. Features like elevators would impact equipment maintenance costs, adding outdoor areas would increase the need for grounds maintenance, and just the slight variance in square footage between different designs will affect many budget lines (think utilities, building maintenance, and cleaning) in ways that really add up over the years.

Discussion in both the ATF meetings brought out some common themes with participants:

- Interest in how various plans would affect library services during construction: people wanted to know whether the library would need to find a temporary location, how long a temporary move would last, and whether work could be done in phases to minimize disruptions.
- Addressing the current facility's issues in ways that will be effective, long-term: participants asked questions about whether a renovated facility would be more costly to maintain than a new one, and were particularly concerned with whether the proposed fix for the roof (a membrane roof) would truly eliminate the issues.
- Overall look of the building: many participants voiced positive feelings about the aesthetics of the current facility and wanted those to be retained. People were also concerned with how the building would look extending closer to Main Street.
- Drive-up book drop: the level of interest in this feature suggests to me that it is a must for any building project. However, it needs to be well thought out and avoid creating or exacerbating pain points in Civic Campus traffic.
- Layout and placement of departments: people were concerned about adding stairs or lengthy walks to access particular areas, especially the adult department (for older adults with mobility issues) and the children's area (strollers, larger groups).
- Acquisition of neighboring properties: many participants expressed negative feelings about the idea of purchasing additional properties, particularly the apartment building to the west. On the other hand, there was vocal support for exploring this from a minority of people. At the least, I would anticipate this route being polarizing.

- Traffic flow of additional driveways and access points to Main Street: there was considerable concern for how adding an entry/exit onto Main would affect traffic.
- Need for more information: some participants felt that it was difficult to select preferred options without having more information on how they would affect the operating budget. As I mentioned above, I will be working with FEH on getting this information before the next ATF meeting, and I think it will be a key part of some participants' decision-making process.

In addition to finalizing space needs and preparing for the SPARK Sessions, FEH staff met with me and members of the management team in early January to work on recommendations to maximize and more efficiently use our current space. In the original proposal from FEH, this element of the project is described as “analyze the functionality of the existing structure to identify steps that might be implemented in the short term to enhance public access and service.” During our walkthrough and meeting, we talked about the major “pain points” Bill Wilson had identified with staff in October and discussed ways that we might reconfigure the space. All recommendations will be part of the final report, but I have initial ideas and drawings that I will share with you at our meeting.

While significantly less costly than any of the long term solutions, implementing these ideas would require some investment from our capital needs fund, and I think it makes sense to see which long-term solutions are preferred by the Advisory Task Force before making any discussions. I'll gather your initial feedback and questions when I share the short-term solutions with you Wednesday, and we'll continue the discussion when the recommendations are final and we review our Capital Needs Plan in April.

**Waukesha County Library Services Plan 2022-2026:** Enclosed in your packets is the draft Waukesha County Library Services Plan 2022-2026. The Act 150 Committee that I'm serving on has been reviewing and updating this plan since last summer, and the draft is the result of that work. A public hearing will be held to seek input on the plan at a date to be determined in February, and will then be presented for approval to the Waukesha County Board of Supervisors. The plan retains much from the previous one while making several significant changes. Among those are:

- An update of the *Minimum to Exempt* standards to reflect the current Waukesha County library environment: These include an increase in collection spending per capita to reflect inflation, and a decrease in the number of computers required in recognition of the growing dominance of personal devices and wifi usage.
- The addition of a new quality assurance standard to help ensure libraries' excellence: A number of core policies become required in phases over the plan's lifetime. PHPL already has the policies in question.
- A change in the definition of circulation in the county library funding collection and distribution formulas to more fairly reimburse libraries for service to residents living in municipalities without libraries: This would allow libraries to be reimbursed for ebook circulation from non-residents just as they are for circulation of physical materials.

## **Non-agenda Items**

**2021 in Numbers:** January always means the beginning of annual report season for us as we compile and analyze the previous year's data. This year, looking at 2021 by the numbers provides a look at how we are rebounding from the extraordinary circumstances of 2020. Like the world itself, we are by no means back to "normal" (whatever that means), but just as we restored many services that were disrupted by COVID, we saw many numbers start to climb in positive directions. Enclosed in your packets is an infographic that shows an increase in library visits and circulation. Both are up significantly from 2020, though not yet back to 2019 levels. It also shows strong programming numbers with the return of in-person programs. We've also highlighted some 2021 accomplishments there.

The circulation information gets more interesting on close analysis. Also enclosed in your packets is a chart showing circulation by material type from 2016 to 2021. I've divided into two broad categories: books and media. Books, you'll notice, have actually rebounded entirely. Some categories, like children's books, have even surpassed 2019 levels. Media items (DVDs, CD audiobooks, and music CDs), on the other hand, have only continued to decline. And while the drop from 2019 to 2020 was more dramatic than in any other year, those categories show a decline that started well before COVID. To me, this means that the long-anticipated sunsetting of physical media collections is a fast-approaching reality. In the long run, physical collection dollars will need to shift to digital collections and streaming media, which continues to grow in circulation and availability. On the plus side, books are doing better than ever. Less space devoted to physical media in the library means greater ability to expand the print collections that are in high demand.

Children's books are an especially exciting story in the numbers. The last chart enclosed shows how our circulation compares, month after month, to libraries close to us in size and service population. As you can see, more books get checked out here by children and families than in much larger libraries. Children's services are strong throughout the Bridges Library System, but this data shows that in this area, PHPL does an outstanding job. There are a lot of factors that impact this, such as the attractiveness of our school district and the number of young families moving into the area. But I believe it also speaks to the emphasis we place on children's services, the investment we make (in staff devoted to children's services and in collection funding), and the quality of the staff that we have.

**Building Maintenance:** Our new maintenance coordinator Brian Versh is doing a great job so far. In addition to taking on routine weekly and monthly maintenance and safety tasks, he has thrown himself into various projects such as installing a new changing table in the family bathroom in the lobby, adding shelving in our server room for Library of Things storage, and ensuring that an LED pendant bulb that failed was replaced promptly and without additional cost to the library.

**Continuing Education:** On Friday, December 3, the library was closed for our biannual Staff Development Day. Planned by Assistant Director Jennie Bahnaman and Administrative Services Manager Lisa Ponto, the day was packed with useful sessions for our staff. We opened with a

presentation from two Bridges Library System staff members: Angela Meyers, Coordinator of Youth and Inclusive Services, and Jill Fuller, Marketing & Communications Librarian. Both explained their roles in providing services to member libraries and shared resources for our staff. While some staff members interact regularly with Bridges staff, others are unfamiliar with what they do, and this was a great way to connect all staff with what's available to them. Heather Bartlett from Circulation, who is an active member of the Sussex Green Team, gave a recycling overview for staff that answered a lot of questions about recycling and disposing of common library materials and office supplies. Jennifer Steffes and Rachel Ruetz led staff in teambuilding exercises. I provided an update on our space needs and facility study and led a discussion on the space needs summary that I used later to make revisions with Bill Wilson from FEH. Becca Werginz gave an overview of the StoryCorps Oral History Project. The grant-funded sewing machines that were purchased for the KidsLab were given a workout: in order to become familiar with this new library-owned equipment, all staff had an opportunity to sew fabric bookmarks under the guidance of Val Johnson.

In the afternoon, each department had time for planning and project work, and then Rachel Ruetz led all staff in a RFID tagging session intended to catch some of the many, many items that were out of the library when their sections were pulled for tagging. Together we tagged almost 2000 items!

In December staff also participated in multiple virtual opportunities for professional development. Val Johnson and Teresa Douglas attended the fifth and sixth sessions of a conference series about family engagement hosted by the Public Library Association. These sessions focused on the topics: *Reinforcing Family Actions to Support Learning: Lifelong Learning* and *Reimagining Partnerships and Support Services*. Victoria VanZile attended a webinar entitled "Challenged Books at Your Library: Managing and Addressing Censorship Attempts" presented by PLA consultant Shannon Schultz. In addition to learning about the most recent instances of censorship attempts, Victoria appreciated the refresher on "freedom to read" principles and how to handle challenges. I completed my course on personnel management with the iSchool at UW-Madison.

**Home Delivery Services Update:** In December we added 2 new patrons to our home delivery service line-up. We currently have 5 participants, so it is not a high demand service. But it is highly valued by those who need and use it; we often get appreciative feedback and thanks from the participants. We're very grateful for the volunteers who make it possible to provide this service. They are a wonderful group! They've been very reliable and have expressed how rewarding it has been for them to help make these deliveries for community members who can't make it to the library.

**Magazine Shelving:** At the December APL meeting, Mukwonago Community Library Director Abby Armour offered up a number of acrylic magazine holders she had been storing in that library’s basement. I jumped on that offer; I’d noticed and admired these at other libraries but found they cost \$50-\$70 a piece (seriously). With these new clear, front-facing holders, we are able to shelve all of the current editions of our adult magazines in a more browsable, appealing display. A big, big thank you to Abby and MCL for generously providing us with a **free** display upgrade (that would have cost approximately \$3,000 had we purchased it new).



**Jennie Bahnaman, Assistant Director/Adult Services Manager and Becca Werginz, Adult & Teen Services Librarian, report on Adult and Teen Services activities for December 2021:**

**Adult Programs & Services**



It was a pretty quiet month for Adult & Teen programming. However, the scent of gingerbread took over the library for the month of December! We received 11 total entries (six families, four teen entries, one children’s entry) for our first annual **Gingerbread House Decorating Competition**. All of the houses were on display in the library for the month of December.

From December 1-19 the public could vote for their favorite in each category: Family, Teens and Children’s. We had over 300 people vote! Winners were announced on December 20 and each received a memorable ornament that included a picture of their winning gingerbread house! Due to the success and high-interest in this event we will definitely plan on offering it again in 2022. Our contest winners were:

**TEEN CATEGORY:** *Up on the Rooftop* by Ellie

**FAMILY CATEGORY:** *The Doyle Emojiland* by The Doyle Family

**CHILDREN’S CATEGORY:** *Gingerbread House Sebastian* by Sebastian

## Memory Café

Pauline Haass Library held our first in-person Memory Café since the beginning of the pandemic. We had 14 in attendance including 4 new to Memory Cafés. Jennie Bahnaman led the Café with assistance from Jennifer Steffes (Circulation Manager), Becca Werginz (Adult & Teen Services Manager), Lynn Ratzmann (Germantown Adult Services Librarian - Wild Plum Memory Café Representative), and Angela Meyers (Bridges Coordinator of Youth and Inclusive Services). Our library is a member of the Wild Plum Memory Café



Group, and librarians in this cohort take turns traveling to other Memory Cafés for support. Attendees enjoyed making holiday ornaments, sharing their favorite holiday memories and singing Christmas carols. The next Memory Café hosted by PHPL is in May 2022, and we will have a representative from the Milwaukee County Domes present to us that day.

## Book Club Updates

Fifteen members of the **Mystery Book Club** met on December 1 to discuss *Every Last Fear* by Alex Finlay. Four members of the **Tuesday Afternoon Book Club** met on December 7 to discuss *The Book Woman of Troublesome Creek* by Kim Richardson. Lisa Ponto (Administrative Services Manager) took over for Adele Loria as facilitator of the Tuesday Afternoon Book Club in January. Six members of the **Wednesday Afternoon Book Club** met on November 17 to discuss *The Story of Arthur Truluv* by Elizabeth Berg. It was a wonderful way to end 2021!

## Collection

Becca Werginz completed weeding the Spirituality section in December. Rachel Ruetz (Technical Services Manager) is working on weeding the Business & Finance section of Adult Non-Fiction. Jennie Bahnaman is working with our new Temporary Librarian, Lori Isola, for the annual weeding of the magazine collection. As we weed and update the magazine collection we are replacing our current edition magazine holders with our new acrylic magazine bins.

## StoryCorps-Bridges Oral History Project Update

Becca Werginz (Adult & Teen Services Librarian) reports on her involvement in the Bridges Library System StoryCorps project. Becca completed six recordings with twelve community members (including one between our very own Adele Loria and Kathy Klager!) for the StoryCorps-Bridges Oral History Project before sending it on to the Fort Atkinson Public Library on December 15. One particularly heartwarming recording was between Mary Ellen and Tom Schneider, a Sussex couple who shared stories about the adventures they've had over the past 54 years of marriage. If you'd like to have a listen, the recording can be found here-



[archive.storycorps.org/interviews/mary-ellen-schneider-and-tom-schneider](https://archive.storycorps.org/interviews/mary-ellen-schneider-and-tom-schneider).

With the consent of the participants, the recordings are made available on the StoryCorps Archive and are also archived at the Library of Congress. The Storykit will return to Sussex on June 28. More information on the project as well as a sign-up form can be found on the Bridges website at [bridgeslibrarysystem.org/storycorps/](https://bridgeslibrarysystem.org/storycorps/).

## Teen Programs & Services

Becca Werginz (Adult & Teen Services Manager) reports on teen programs. On December 2, 9 teens made their own set of handwarmers at Make It! Teen: DIY Handwarmers. Not only did they get the chance to practice their sewing skills, the handwarmers will keep their hands nice and toasty this winter. Some planned on giving them as Christmas gifts!



With the help of library pages, Becca assembled a new bulletin board “Get Your Mitts on a Good Book!” for the season. The new display highlights some of our favorite wintery reads.

## **Valerie Johnson, Children’s Services Manager, reports on Children’s Department activities for December 2021:**

### **Around the Department**

In early December it was decided that we would begin the children’s department’s gradual return to offering interactive play. The small tables were moved back into the public area and set up with puzzles. Puzzles are also available in the board book room. Our intent is to offer play without encouraging a great deal of crowding together. We have purchased a product called CleanSmart Toy Disinfectant which is a spray that kills viruses and bacteria without requiring rinsing or drying. Covid or not, treating our heavily used toys with a product such as this is a sensible, labor-saving addition to our procedures.





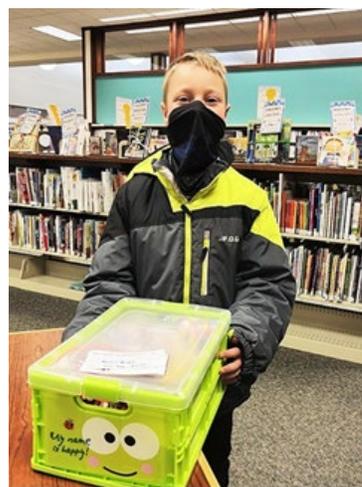
At the end of the month our giant display bulletin board was changed to a winter scene created by Teresa Douglas. The northern lights and snow landscape will serve to showcase the upcoming IditaRead winter reading challenge.

### Programs

The final **Make It! Junior** project of the season provided kids everything needed to make a colorful stained glass trees scene. Over the winter break that started in December we offered leftover kits from Make It! and from storytime to kids who visited our desk looking for something to do.



These grab and go kits continue to be one of our most popular programs. Kids approach our desk with excitement to inquire about available kits, and parents consistently express gratitude for the activity. This program seems to build enormous good will with the community and gives them a little piece of the library to take home. We are inspired by the idea of 100+ kids working on the same project. At the end of every season we conduct a prize drawing for art supplies. Children enter once for each project that they complete. Our excited winners for the September–December season are Emmy and Ansel, pictured below.



**Firsties** and **Secondies**, our school-library partnership program, has had a successful first few months. The heart of this program requires beginning readers to visit the library at least once

each month in response to an invitation through a video filmed at the library and shown to kids during school library class. Incentives to be picked up at the library have frequently encouraged families who are new to the library to stop in for the first time ever. There were 246 student visits during October, November, and December. Of the total number of students in first and second grade, 22% have made at least one library visit this past season.

## Collection

| Children's book bundles      | number of bundles | number of items in bundles |
|------------------------------|-------------------|----------------------------|
| staff-created book bundles   | 38                | 148                        |
| special request book bundles | 0                 | 0                          |
| <b>Total</b>                 | <b>38</b>         | <b>148</b>                 |

## Professional Activities

The children's services staff held a meeting December 3 and spent a good deal of time discussing and planning Summer Reading Program 2022. The theme next summer is *Oceans of Possibilities* featuring marine imagery and the art work of illustrator Sophie Blackall. Every staff member left the meeting with assignments to begin work on aspects of the program.

## Statistics

| Adult & Youth Reference        | Totals     |
|--------------------------------|------------|
| Youth Reference Ques.          | <b>380</b> |
| <i>Youth Information Ques.</i> | <b>9</b>   |
| Adult Reference Ques.          | <b>356</b> |
| <i>Adult Information Ques.</i> | <b>29</b>  |
| One-on-One Tech Help           | <b>11</b>  |
| Value Line use                 | <b>9</b>   |
| Study Rooms use                | <b>97</b>  |
| Faxes                          | <b>13</b>  |

| Children's Programs                              | Virtual Attendance | In-person Attendance | Self-Led (Passive) |
|--|--------------------|----------------------|--------------------|
| 1000 Books Before Kindergarten new registrations |                    |                      | 12*                |
| Make It Jr. grab and go distributed              |                    |                      | 62*                |
| Make It Jr. report back (drawing tickets)        |                    |                      | 24*                |
| Firsties December video views                    |                    |                      | 38*                |
| Firsties Parent video views                      |                    |                      | 11*                |
| Firsties visits                                  |                    | 66*                  |                    |
| <b>Total</b>                                     |                    | <b>66</b>            | <b>147</b>         |

**1000 Books Before Kindergarten total books read: 1,907**

| <b>Adult Virtual/Online/In-Person Programs</b> | <b>Virtual Attendance</b> | <b>In-person Attendance</b> | <b>Self-Led (Passive)</b> |
|--|---------------------------|-----------------------------|---------------------------|
| Tuesday Afternoon Book Club (12/7)             |                           | 4*                          |                           |
| Mystery Book Club (12/1)                       |                           | 15*                         |                           |
| Wednesday Afternoon Book Club (12/15)          |                           | 6*                          |                           |
| Memory Cafe (12/20)                            |                           | 14                          |                           |
| Gingerbread Voting Entries (Dec 1-19)          |                           |                             | 300                       |
| Total  |                           | <b>39*</b>                  | <b>300</b>                |

| <b>Teen Virtual/Online/In-Person Programs</b> | <b>Virtual Attendance</b> | <b>In-person Attendance</b> | <b>Self-Led (Passive)</b> |
|---|---------------------------|-----------------------------|---------------------------|
| Make It! Teen: DIY Handwarmers (12/2)         |                           | 9*                          |                           |
| Total   |                           | <b>9*</b>                   |                           |

\* DPI Annual Report Programming Statistics

**Jennifer Steffes, Circulation Manager, reports on Circulation activities for November 2021:**

Children off of school for the holidays, battling crowds for the perfect gifts, last minute hustle and bustle, who has time for the library? Lots of people! The library continues to be a busy place even though we are now in the winter season. The RFID project continues in the circulation department as the final remaining items are tagged. The ease of checking out continues to grow for staff and patrons, alike. The Pages have started a shifting and shelving project throughout the library. They are organizing each area while also making sure each book is in the proper place. Shifting also allows for items to be more easily accessible.

**Rachel Ruetz, Technical Services Manager, reports on Technical Services activities for December 2021:**

As always, December was a busy month in Tech Services processing all end of year arrivals. We put an emphasis on getting all 2021 purchases out on the shelves before the end of the year. We've also RFID tagged over 90% of our collection (86,000 items)! Many thanks to our wonderful volunteers and staff members who have spent so much time on this project!

**Statistics:**

|   |              |
|---|--------------|
| <b>Items processed</b>  | <b>707</b>   |
| <b>Volunteer hours (including RFID, processing, and book sale room)</b> | <b>35.75</b> |
| <b>Materials encoded with RFID tags</b>                                 | <b>6393</b>  |

## STATISTICS FOR MONTH OF DECEMBER, 2021

|                               | Dec. 2021    | Dec. 2020    | YTD           | YTD 2020      | % change |
|-------------------------------|--------------|--------------|---------------|---------------|----------|
| <b>ALL CIRCULATION</b>        | <b>24348</b> | <b>23061</b> | <b>325697</b> | <b>289411</b> | 12.5%    |
| PHYSICAL MATERIAL CIRCULATION | 21202        | 20126        | 287551        | 255299        | 12.6%    |
| E-MATERIAL DOWNLOADS          | 3146         | 2935         | 38146         | 34112         | 11.8%    |
| HOURS OPEN                    | 247.5        | 156          | 2756.3        | 2069          | 33.2%    |

|  |        | YTD   |  |  |
|--|--------|-------|--|--|
| HOLDS FILLED <b>FOR PHPL</b> BY OTHER CAFÉ LIBRARIES: -  | 1988   | 26777 |  |  |
| HOLDS FILLED FOR OTHER CAFÉ LIBRARIES <b>BY PHPL</b> : + | 1940   | 25858 |  |  |
| Crossovers to PHPL from other library communities: +     | 4565   | 60387 |  |  |
| Crossovers from Sussex to other CAFE libraries: -        | 1186.0 | 10876 |  |  |
| <b>NET LENDING: 3331</b>                                 |        | 48592 |  |  |

|                | Sussex | Other | TOTAL | 2020  |
|----------------|--------|-------|-------|-------|
| PHYSICAL CIRC: | 9093   | 12109 | 21202 | 20126 |

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**Cards issued:** 49

**Reference questions answered:** 736

**Informational questions answered:** 38

**Library visits this month:** 5712

**Materials purchased:** 620  
(year to date total:) 7265

**Study Room usage** 97

**One-on-one technology lessons:** 11

**Fax Service:** 13

**Value Line:** 9

**Curbside pickup:** 16

**Meeting Room Use:**

Quad Room: 17

Small meeting room: 4

**INTERNET USE\*\*:** 261 sessions

**TOTAL HOURS\*\*:** 188:18:00

**AVG. SESSION\*\*:** 43.287 minutes

**Wireless:** 964 sessions

## SUMMARY OF ESTIMATED SPACE NEEDS - FEH DESIGN

| BASIC INFORMATION                   |                         |
|-------------------------------------|-------------------------|
| Library Name                        | Pauline Haas - Proposed |
| Year Space Needs Analysis Performed | 2021                    |
| Space Needs Calculation Target Year | 2041                    |
| Design Population Applied           | 32,103                  |

| COLLECTION SPACES                      | Square Footage |
|--|----------------|
| Adult Collection Space Required        | 5,972          |
| Children's Collection Space Required   | 3,803          |
| Young Adult Collection Space Required  | 620            |
| <b>TOTAL COLLECTION SPACE REQUIRED</b> | <b>10,395</b>  |

| SEATING SPACES   | User Seats     | Square Footage |
|--|----------------|----------------|
| Recommended Total User Seating Base (not including computer or meeting room seating).<br>NOTE: Total number of seats may differ from sum of counts for individual areas due to rounding. | 90             |                |
| <b>CASUAL AND STUDY SEATING</b>  |                |                |
| Adult Casual and Study Seating Suggested Based on Population Served  | 40             | 1,920          |
| Children's Casual and Study Seating Suggested Based on Population Served   | 40             | 900            |
| Young Adult Casual and Study Seating Suggested Based on Population Served  | 10             | 400            |
| <b>TOTAL CASUAL AND STUDY SEATING REQUIRED</b>   |                | <b>3,220</b>   |
| <b>COMPUTER/ TECHNOLOGY SEATING</b>  |                |                |
|  | Computer Seats | Square Footage |
| Adult Desktop Computer Workstations  | 8              | 320            |
| Children's Desktop/ Early Literacy/ Educational Game Workstations  | 2              | 80             |
| Young Adult Desktop Computer Workstations  | 4              | 180            |
| Laptop Bar Stations  | 0              | -              |
| <b>TOTAL COMPUTER/ TECHNOLOGY SPACE REQUIRED</b>   |                | <b>580</b>     |
| <b>TOTAL USER SEATING SPACE REQUIRED</b>   |                | <b>3,800</b>   |

| STAFF SPACES                               | Square Footage |
|--|----------------|
| Director's Office                          | 200            |
| Other Enclosed Offices                     | 850            |
| Circulation Workstations                   | 320            |
| Reference/ Information Desk Workstation(s) | 130            |
| Children's Service Desk Workstation(s)     | 200            |
| Young Adult Service Desk Workstation(s)    | 100            |
| Other Service Desks                        | 0              |
| General Staff Workspace                    | 2400           |
| Staff Lunch/ Break Room                    | 500            |
| <b>TOTAL STAFF WORKSPACE REQUIRED</b>      | <b>4,700</b>   |

| MEETING AND GATHERING SPACES | Occupancy | Square Footage |
|------------------------------|-----------|----------------|
| Conference Room #1           | 16        | 540            |
| Conference Room #2           | 0         | 0              |
| All-Purpose Room #1          | 125       | 2250           |

|  |     |              |
|--|-----|--------------|
| All-Purpose Room #2                        | 0   | 0            |
| Children's Program Area                    | 100 | 1300         |
| Children's Craft Area                      | 0   | 0            |
| Children's Creative Play Space             | 8   | 400          |
| Maker Space                                | 20  | 700          |
| Computer Lab                               | 0   | 0            |
| Group Study and Tutoring Spaces            | 30  | 850          |
| Other                                      | 0   | 0            |
| <b>TOTAL MEETING &amp; GATHERING SPACE</b> |     | <b>6,040</b> |

| <b>SPECIAL USE SPACES</b>               | <b>Square Footage</b> |
|---|-----------------------|
| Coffee Bar                              | 240                   |
| Café                                    | -                     |
| Art Gallery                             | -                     |
| Friends' Book Sale Area                 | 128                   |
| Friends' Gift Shop                      | -                     |
| Friends' Office/ Book Sorting Area      | 514                   |
| Co-Working Space                        | -                     |
| Office for another organization/ agency | -                     |
| AMH (RFID) sorting equipment            | 358                   |
| <b>TOTAL SPECIAL USE SPACES</b>         | <b>1,240</b>          |

| <b>MISCELLANEOUS SPACES</b>   | <b>Square Footage</b> |
|---|-----------------------|
| Space for areas such as restrooms, mechanical rooms, janitorial storage are included in the percentage that is applied in the Structural Space/ Non-Assignable Space category. However, there are some some important spaces that are not included in the functional categories above that are important to library operations. These are broken out below. |                       |
| Copy Machine(s)   | 200                   |
| Dictionary Stand(s)   | 0                     |
| Atlas Stand(s)  | 0                     |
| Map Case(s)   | 0                     |
| Microform Cabinet(s)  | 0                     |
| Vertical File Cabinet(s)  | 0                     |
| Lateral File Cabinet(s)   | 0                     |
| <b>TOTAL MISCELLANEOUS SPACES</b>   | <b>200</b>            |

| <b>UNCATEGORIZED SPACE</b>       | <b>Square Footage</b> |
|----------------------------------|-----------------------|
| Supply Storage                   | 200                   |
| General Storage                  | 805                   |
| Entrance Lobby(ies)              | 600                   |
| Service/ Loading Entrance        | 268                   |
| Mechanical Mezzanine             | 970                   |
| <b>TOTAL UNCATEGORIZED SPACE</b> | <b>2,843</b>          |

**TOTAL FUNCTIONAL SPACE** 29,218

STRUCTURAL SPACE/ NON-ASSIGNABLE SPACE PERCENTAGE APPLIED 28 %

**GRAND TOTAL ESTIMATED TOTAL SPACE NEED (GROSS SQUARE FEET) 37,399 GSF**

| FUNCTIONAL AREA                           | Estimated Existing Size in Square Feet | Recommended Size Based on Current Population Served | Proposed 20-Year Recommendation | NOTES   | Difference Between Existing and Proposed (Square Feet) | Difference Between Existing and Proposed (Percentage) |
|---|--|---|---------------------------------|---|--|---|
| <b>Collections</b>                        |  |   |                                 |   |  |   |
| Adult Collection Space                    | 3,687                                  | 4,420   | 5,972                           |   | 2,285  | 62%   |
| Children's Collection Space               | 2,335                                  | 2,425   | 3,803                           |   | 1,468  | 63%   |
| Young Adult Collection Space              | 400                                    | 560   | 620                             |   | 220  | 55%   |
| <b>Seating</b>                            |  |   |                                 |   |  |   |
| Adult Casual and Study Seating            | 1,410                                  | 2,300   | 1,920                           | Reduced to 40 seats for 20-year - Recommended current uses our normal planning ratios   | 510  | 36%   |
| Children's Casual and Study Seating       | 790                                    | 821   | 900                             |   | 110  | 14%   |
| Young Adult Casual and Study Seating      | 171                                    | 383   | 400                             |   | 229  | 134%  |
| <b>Public Computer/ Technology Spaces</b> |  |   |                                 |   |  |   |
| Adult Desktop Computers                   | 250                                    | 260   | 320                             |   | 70   | 28%   |
| Children's Desktop/ Educational Computers | 100                                    | 140   | 80                              | Reduced dedicated computer locations with focus on mobile device checkout within library (the allocation is only two desktop computers)                     | (20)   | -20%  |
| Young Adult Desktop Computers             | -                                      | 80  | 180                             |   | 180  | New space category                                    |
| Laptop Bar Stations                       | -                                      | -   | -                               |   |  |   |
| <b>Staff Spaces</b>                       |  |   |                                 |   |  |   |
| Director's Office                         | 240                                    | 190   | 200                             |   | (40)   | -17%  |
| Other Enclosed Offices                    | 756                                    | 850   | 850                             |   | 94   | 12%   |
| Circulation Desk Workstations             | 220                                    | 320   | 320                             | Need to make sure that there is enough space for book trucks in close proximity and that the movement of public on the public side of the desk is adequate. | 100  | 45%   |
| Reference Desk                            | 250                                    | 130   | 130                             |   | (120)  | -48%  |
| Children's Service Desk                   | 200                                    | 260   | 200                             | Similar to existing size  | -  | 0%  |
| Young Adult Service Desk                  | -                                      | 100   | 100                             |   | 100  | New space category                                    |
| General Staff Workspaces                  | 2,084                                  | 2,300   | 2,400                           |   | 316  | 15%   |
| Staff Lunch/ Break Room                   | 250                                    | 660   | 500                             | Doubled in size but still under typical ratio for size of staff   | 250  | 100%  |
| <b>Meeting &amp; Gathering Spaces</b>     |  |   |                                 |   |  |   |
| Public Conference Room                    | 270                                    | 660   | 540                             | Occupancy 16  | 270  | 100%  |
| All-Purpose Meeting Room                  | 1,432                                  | 2,000   | 2,250                           | Occupancy 125   | 818  | 57%   |
| Children's Program Area                   | 547                                    | 880   | 1,300                           | Occupancy approximately 100 kids  | 753  | 138%  |
| Children's Creative Play Space            | -                                      | 160   | 400                             |   | 400  | New space category                                    |
| Maker Space                               | -                                      | 600   | 700                             | Occupancy 20  | 700  | New space category                                    |
| Group Study/ Tutoring Spaces              | 275                                    | 400   | 850                             |   | 575  | 209%  |
| Kitchen                                   | 288                                    | *   | *                               | *Included in meeting suite  |  |   |
| <b>Special Use Spaces</b>                 |  |   |                                 |   |  |   |
| Coffee Bar                                | -                                      | 240   | 240                             |   | 240  | New space category                                    |
| Friends' Book Sale Area                   | 110                                    | 110   | 128                             |   | 18   | 16%   |
| Friends' Storage/ Sorting Area            | -                                      | 400   | 514                             | Currently occupies staff workspace  | 514  | New space category - See note                         |
| Automated Materials Handling Sorter       | -                                      | 358   | 358                             |   | 358  | New space category                                    |
| <b>Miscellaneous Spaces</b>               |  |   |                                 |   |  |   |
| Copy Machine(s)                           | 60                                     | 100   | 200                             |   | 140  | 233%  |
| Miscellaneous Furnishings                 | 100                                    | -   | -                               |   | (100)  | -100%   |
| <b>Uncategorized Spaces</b>               |  |   |                                 |   |  |   |
| Supply Storage                            | 200                                    | 200   | 200                             |   |  |   |
| General Storage                           | 400                                    | 606   | 805                             |   | 405  | 101%  |
| Entrance Lobby                            | 400                                    | 606   | 600                             |   | 200  | 50%   |
| Service/ Loading Entrance                 | 100                                    | 202   | 268                             |   | 168  | 168%  |
| Mechanical Mezzanine                      | 970                                    | 970   | 970                             |   |  |   |
| <b>TOTAL FUNCTIONAL SPACE</b>             | <b>18,295</b>                          | <b>24,691</b>                                       | <b>29,218</b>                   |   | <b>10,923</b>  | <b>60%</b>  |
| <b>STRUCTURAL/ NON-ASSIGNABLE SPACE</b>   | <b>5,123</b>                           | <b>6,913</b>  | <b>8,181</b>                    | Using 28% of assignable   | <b>3,058</b>   | <b>60%</b>  |
| <b>GROSS SQUARE FEET (GSF)</b>            | <b>23,418</b>                          | <b>31,604</b>                                       | <b>37,399</b>                   |   | <b>13,981</b>  | <b>60%</b>  |
| 12/20/21                                  | 23,418 Existing Actual                 |   |                                 |   |  |   |



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# Waukesha County Library Services Plan 2022-2026

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Approved by the  
Waukesha County Board of Supervisors

XXX, 2022

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# Waukesha County Library Planning Committee

## **Committee Members**

Jim Batzko (Waukesha County Board)

Dave DeAngelis (Village of Elm Grove, local official) **\*Chair of the County Library Planning Committee**

Betsy Felix (Library Trustee, Delafield Public Library)

Joel Gaughan (Waukesha County Board)

Bruce Gay (Library Director, Waukesha Public Library)

Laura Gest (Library Director, Hartland Public Library)

Adele Loria (Library Director, Pauline Haass/Sussex Public Library)

Robyn Ludtke (Library Trustee, Hartland Public Library)

Dale Noll (Library Trustee, Pewaukee Public Library)

Howard Pringle (Trustee, Mukwonago Community Library and Bridges Library System)

Stephanie Ramirez (Library Director, Delafield Public Library)

Edell Schaefer (Library Director, Brookfield Public Library)

Nancy Wilhelm (Trustee, Alice Baker (Eagle) and Bridges Library System)

## **Advisory Participants**

Karol Kennedy, Bridges Library System Director

Alex Klosterman, Waukesha County Senior Financial Analyst

Mellanie Mercier, Bridges Library System Assistant Director/Automation Coordinator

## Executive Summary

The Waukesha County Library Planning Committee recommends the following five-year plan that will encourage public libraries in the county to seek the path of excellence in serving their patrons. Libraries are continually adapting to change and reinventing themselves for the benefit of their communities. The success of that constant transformation is evident in the continued high use of libraries in this county.

While the libraries in Waukesha County are all fully autonomous and governed by local library boards, they benefit greatly by their collaborative efforts such as the CAFÉ automation consortium. The citizens receive the benefit of strong, locally supported libraries without the undue burden that exists when one institution has the sole responsibility of providing all services and materials to meet its own community's needs. The vast body of information that exists in today's world is difficult to comprehend but libraries working cooperatively can leverage their resources and offer important access to their citizens. Libraries must work together to efficiently and effectively tackle the challenges they face resulting from limited funding and the changing landscape of technology.

While the public library was conceived in an age of information scarcity, today's networked world is one of information abundance and mobility. The spread of powerful digital information and communication technologies has touched every aspect of daily life, creating new opportunities. The Internet has become the critical gateway for accessing information, job opportunities, education, financial and government services, healthcare resources, and civic participation. But this new world of "information plenty" creates the need for new essential skills. Access to digital networks and the development of digital literacy skills are essential for full participation in modern society. Economic, educational, civic, and social opportunities are tied to a whole new set of knowledge and skills that barely existed a generation ago, and people without these skills or access to this information abundance are quickly left behind.

The public library can be at the center of these changes: a trusted community resource and an essential platform for learning, creativity, and innovation in the community. Public libraries have the essential qualities needed to thrive in this new information-rich, knowledge-based society. Providing access and connecting knowledge to the needs of individuals and the community have always been at the center of the mission and purpose of libraries. The emerging value proposition of the public library is built around three key assets - **people, place and platform** - and the ability to scale in a world of knowledge and negotiate the complicated world of knowledge and social networks.<sup>1</sup>

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

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

- ❖ An update of the *Minimum to Exempt* standards to reflect the current Waukesha County library environment.
- ❖ The addition of a new quality assurance standard to help ensure libraries' excellence.
- ❖ A change in the definition of circulation in the county library funding collection and distribution formulas to more fairly reimburse libraries for service to residents living in municipalities without libraries.

DRAFT

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<sup>1</sup>*Rising to the Challenge: Re-Envisioning Public Libraries*. The Aspen Institute, 2014.

## Introduction

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

- ❖ The importance of providing all of Wisconsin residents free access to knowledge, information, and diversity of ideas;
- ❖ The critical role played by public, school, special, and academic libraries in providing that access;
- ❖ The major educational, cultural, and economic asset that is represented in the collective knowledge and information resources at the libraries in Wisconsin; and
- ❖ The most efficient and effective management of Wisconsin’s library resources occurs through resource sharing and collaboration.

## Vision

***Strong Libraries Build Strong Communities.***

*Waukesha County citizens are served by a vibrant system of well-managed, accessible, and connected libraries that are essential to building strong communities.*

## Mission Statement and Core Values

Waukesha County supports and strengthens high quality library services to its citizens through strong local libraries that offer a return on investment for taxpayers. All libraries are committed to operating with these core values:

- ❖ *Excellence*
- ❖ *Customer service*
- ❖ *Fiscal responsibility*
- ❖ *Collaboration*
- ❖ *Integrity*
- ❖ *Innovation*
- ❖ *Community Engagement*
- ❖ *Connectivity*
- ❖ *Inclusion*

## Statutory Requirements

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

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

A county library planning committee was appointed by Paul Decker, Chair of the Waukesha County Board, in the summer of 2021 to develop a new county library plan. A public hearing was held to seek input on this plan and was presented to and approved by the Waukesha County Board of Supervisors on **XXX, 2022**. This plan supersedes the *Waukesha County Library Service Plan: 2017-2021*.

## Planning History

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

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### 2001-2003 Plan

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

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

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

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## 2004-2006 Plan

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

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

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

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## 2007-2011 Plan

---

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

- Continue the standards implementation freeze;
- Establish a committee to review the formula for distribution of funds to county libraries;
- Encourage the CAFÉ Council to evaluate the effectiveness of the CAFÉ shared automation system and share the results with the WCFLS (Waukesha County Federated Library System) Board;

- Encourage the strengthening and improving of one automation system shared by all libraries in the county; and
- Defer consideration of WCFLS' organizational form, local autonomy statement and library establishment until after the final result of the Library Governance Options report.

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

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

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

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### 2008 - County Library Funding Committee

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

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

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### 2012-2014 Plan

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

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

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### 2017-2021 Plan

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County Board Chair Paul Decker appointed the fifth Act 150 Committee, chaired by Dave DeAngelis. It met from August 2016 to March 2017. The main recommendations of the committee were:

- Update the standards to reflect the current Waukesha County library environment and include requirements based on a graduated population scale;
- Add new quality assurance standards to help ensure libraries' excellence;
- Change standards language to emphasize that the county library standards are "minimums to exempt" rather than aspirational;
- Change in the library distribution formula to more accurately credit libraries for sharing their materials; and
- Remove outdated language in the county code's library distribution formula in order to acknowledge the statutory authority vested in the regional library system board.

## County Profile

Understanding the trends in the population of Waukesha County provides the background for planning. The 2020 Census and 2019 estimates showed the following in Waukesha County:

- Approximately 406,978 people reside in Waukesha County, making it the third most populated county in the state.
- Waukesha County population projections indicate an increase by .41% annually
- The median age is 43.2 years old.
- The median age will continue to increase, reflecting the aging of “baby-boomers” coupled with the smaller number of people born in the late 1960s and early 1970s.
- There are an estimated 158,808 households--72% of them are family households with a married couple.
- Approximately 9.6% of the population is disabled.
- Almost 12% of the population in the county are minorities.
- Median household income is the highest of any county in the state.
- The poverty rate is 5% of county residents.

# County Library Services Profile

There are sixteen public libraries in the county (Figure 1.) providing library services (shown in Appendix D) to residents of Waukesha County. A resident may visit any of these public libraries to seek information, materials, and services. The sixteen libraries are located throughout Waukesha County.

**Figure 1. Waukesha County Libraries**



- |   |                              |   |   |
|---|------------------------------|---|---|
| 1. Big Bend Village Library             | 2. Brookfield Public Library | 3. Butler Public Library                  | 4. Delafield Public Library               |
| 5. Alice Baker Memorial Library (Eagle) | 6. Elm Grove Public Library  | 7. Hartland Public Library                | 8. Menomonee Falls Public Library         |
| 9. Mukwonago Community Library          | 10. Muskego Public Library   | 11. New Berlin Public Library             | 12. Town Hall Public Library (North Lake) |
| 13. Oconomowoc Public Library           | 14. Pewaukee Public Library  | 15. Pauline Haass Public Library (Sussex) | 16. Waukesha Public Library               |

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

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

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

## Regional Public Library Systems

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

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

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

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

A statewide Public Library System Redesign (PLSR) project was launched in fall of 2015. The project was led by a 10-member Steering Committee appointed by the State Superintendent of the Department of Public Instruction (DPI). The committee represented the regional and service level diversity of Wisconsin Libraries, from small rural public library systems to large urban public libraries. The committee was formed to oversee a process created and endorsed by the Council on Library and Network Development (COLAND) and accepted by the Superintendent to consider how to best provide public library system services in Wisconsin.

The statewide PLSR Project was completed in 2018 and the Final report of the PLSR Steering Committee was delivered to the State Superintendent's Office on March 8, 2019, summarizing three-and-a-half years of work by the Steering Committee, Workgroups, and sub-committees. DPI staff within the Division for Libraries and Technology have been charged with implementing the recommendations of the Steering Committee and COLAND is actively monitoring the progress of the implementation process. The work of DPI staff will be guided by the information, data, and feedback gathered from the library community.

The goal of PLSR is to develop a plan for implementation of new equitable, efficient, and effective models of service to provide the best service possible for all public libraries and library users. An initial implementation strategy was released to the library community in fall of 2019 that was prioritized by support expressed during public listening sessions conducted in the Spring of 2019. In June 2020, in light of the COVID-19 pandemic and the resulting impact on libraries and library systems, DPI staff worked in partnership with the 16 Public Library System Directors to reprioritize implementation activities.

The PLSR Steering Committee Recommendations include:

- Develop Standards, Best Practices, and Accountability Structures for Public Library Systems
- Enhance Collaboration by Creating Incentives and Removing Barriers
- Reduce the Number of Public Library Systems

- Analyze the Current Funding Formula
- Initiate Delivery Service Pilot Projects
- Create an Effective, Well Managed, State-Scale Discovery Layer
- Implement a Learning Management System for Professional Development

## Planning Process

County Board Chairman Paul Decker appointed a 13-member committee to undertake this most recent Waukesha County library planning effort. The committee met from July 2021 until February, 2022. Seven meetings were held during this planning process. Library input was solicited and received throughout the process.

A public hearing was held on XXX XX, 2022 to receive public input on the plan prior to approval by the Act 150 County Library Planning Committee.

This plan contains recommended revisions to the county's mandatory library *Minimum to Exempt* standards for exemption to the county library tax. Mandatory standards take effect if they are approved by the County Board of Supervisors and the public library boards of at least 50% of the participating municipalities in the county that contain, according to the most recent estimate prepared under Wisconsin state statute 16.96, at least 80% of the population of participating municipalities in the county.

## Key Strategic Issues

1. Excellence
2. Type of Organization
3. County Funding Collection Formula
4. County Funding Distribution Formula
5. Required Standards: Minimums to Exempt from the County Library Tax
6. Library Establishment
7. Relationships with Others
8. CAFÉ Shared Automation System
9. Regional Library System Membership and Services

### Strategic Issue #1. Excellence

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

Historic metrics are in the process of change. State and national data reporting agencies have begun to collect additional data that can be used to measure service delivery in the changing library landscape. In Wisconsin, digital content is owned collectively statewide with public libraries and library systems financing access through license purchases. While digital collections (and their usage) are being counted, all participating members own the digital collections. This shared ownership complicates a traditional analysis of a library collection because numbers no longer reflect single libraries. For example, the Big Bend Village Library reported on its state annual report that it owns 156,430 e-books through Overdrive, as does the Waukesha Public Library because both libraries have access to the Wisconsin Digital Library. In a state without a shared buying pool, the number of e-books owned by any given library would likely be a much smaller number.

Comparing service measures data of counties within the state with similar service populations helps to identify how the libraries in Waukesha are performing. Historically, the 16 libraries in Waukesha County have outranked many of their state peers on important library performance measures based on state library data. Figure 4 provides Waukesha County information and rankings compared to those of the 13 most populous counties in Wisconsin, using the most recent data available and comparing it to data from 2015, which was used in the last county library plan five years ago.

As seen in Figure 4, on all measures but two, Waukesha County has either stayed at the same rank or improved its state ranking. The two measures where Waukesha County libraries experienced a decrease in ranking were expenditure/circulation and per capita \$ - County. The expenditure per circulation is moving in a positive direction as libraries have become more efficient. Waukesha's per capita \$ - County increased by 0.1% while the other counties average decreased by 0.1% resulting in a ranking shift from 2 to 3. E-content circulation per capita was not included in the previous plan but has been added as a service measure.

It is important to note that while Waukesha County libraries consistently lead the way based on statewide benchmarks, there has been a decrease in five of the nine historical performance benchmarks. However, the percentage of change is small, and some decreases correspond to a shift in the way libraries are used.

Please note the following definitions:

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

Figure 4: Wisconsin Data for Comparable County Populations – 2019 Data

| Service Measure                         | Waukesha Co. Actual 2019 | Avg. Annual Change in 4 years | Other Counties Avg. in 2019 | Avg. Annual Change 4 years - in other counties | Waukesha Co. Current Rank of Counties | Waukesha Co. Rank of Counties 4 Years Ago |
|---|--------------------------|-------------------------------|-----------------------------|--|---------------------------------------|---|
| Per Capita \$ - Local                   | \$47.36                  | 0.9%                          | \$39.62                     | 0.7%   | 3                                     | 4   |
| Per Capita \$ - County                  | \$38.78                  | 0.1%                          | \$31.16                     | -0.1%  | 3                                     | 2   |
| Per Capita \$ - Combined                | \$45.45                  | 0.8%                          | \$40.39                     | 0.9%   | 3                                     | 3   |
| Circulation per visit                   | 2.2                      | 0.0%                          | 1.77                        | -3.8%  | 4                                     | 5   |
| Circulation per capita                  | 11.6                     | 0.0%                          | 8.12                        | -2.8%  | 2                                     | 4   |
| Reference questions/capita              | 0.81                     | -1.8%                         | 0.62                        | -1.5%  | 2                                     | 2   |
| Materials expenditures/capita           | \$5.57                   | -0.5%                         | 4.13                        | -1.0%  | 2                                     | 2   |
| Circulation per open hour               | 95.87                    | 0.3%                          | 71.77                       | -2.1%  | 2                                     | 3   |
| Visits/capita                           | 5.2                      | -0.2%                         | 4.57                        | -0.5%  | 3                                     | 4   |
| FTE per 1000 population                 | 0.58                     | -0.3%                         | 0.53                        | 0.7%   | 3                                     | 5   |
| Expenditure/circulation                 | \$4.15                   | 0.8%                          | 5.8                         | 5.8%   | 11                                    | 8   |
| Public Internet Computers per 1,000 pop | 0.98                     | -0.8%                         | 0.97                        | 0.7%   | 6                                     | 6   |
| E-content circulation per capita        | 1.25                     | 11.1%                         | 1.04                        | 11.2%  | 3                                     | 4   |

\*12 Comparison Counties: Brown, Dane, Kenosha, La Crosse, Marathon, Milwaukee, Outagamie, Racine, Rock, Sheboygan, Washington, and Winnebago

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

## Goals and Action Steps for Strategic Issue #1 - Excellence

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

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

**Objective:** The library system staff will annually provide a report to each library that compares its library to comparable libraries.

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

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

## Strategic Issue #2. Type of Organization

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

- ❖ There are now only two joint libraries in the county.
- ❖ The district library legislation under discussion at the time of the study has not been enacted and shows no signs of being re-introduced.
- ❖ The library system has become a two-county regional library system.
- ❖ All county libraries are now a part of the CAFÉ automation consortium.

The current county library planning committee discussed the type of organization and confirmed that remaining in a federated library system arrangement is desirable. The option to change to a consolidated county library was discussed and is not recommended for the reasons cited in the previous study. The committee recommends that the statutorily required county library planning be completed by a county library planning committee as has been done in the past. Creating another layer of government by forming a county library service, such as exists in Dane County, is not recommended as long as the current regional library system conditions remain. The option to utilize the services of the regional library system in county library planning, budgeting, compliance, and development was considered the best way to maximize efficiencies and build on expertise and relationships already in place.

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

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

**Objective:** The regional library system staff will monitor implementation of the statewide Public Library System Redesign (PLSR) project recommendations and continue to provide feedback to DPI and COLAND expressing the need to provide a high level of county library services to avoid creating a need for an additional organization to handle county library responsibilities in the future.

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

## Strategic Issue #3. County Funding Collection Formula

Like all Wisconsin library budgets, Waukesha County municipal library budgets are built on a patchwork of funding sources. County funding is a significant source of funding to libraries that, as required by state law, serve a large number of residents living in municipalities without libraries. Act 150 introduced a requirement in state statute that sets forth a minimum rate at which counties must tax communities without their own libraries for their residents' library use. Waukesha County ordinance 11-4 sets requirements beyond the minimum required in state law. The ordinance can be found at the following link: <https://tinyurl.com/b74rv2wv> .

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

The county library planning committee reviewed the current county library collection formula as defined in Ordinance 11-4 and recommends this formula continue to be used. The amount to be collected from residents of Waukesha County municipalities without their own libraries through the County Library tax is determined by multiplying the total amount of circulation to non-library community residents (TNR) as a percentage of total countywide circulation (Figure 5.) by the total allowable operating expenditures of all county libraries (Figure 6.) as shown in Figure 7.

Historically, only the circulation of physical materials has been used in this calculation. However, in recent years the circulation of electronic materials has grown significantly. From 2019 to 2020, there was an increase in digital usage in the county of 18.9%. These circulations are accurately measured by place of residence, as are physical circulations. The TNR proportionate use of electronic materials is historically higher for electronic materials. In 2020, the TNR proportion for physical materials was 18.629%, while the proportion for electronic materials was 22.124%.

The committee recommends the circulation of both physical and electronic materials be included in the collection formula. By including both forms of circulation, the ratio of library use by residents of non-library and library municipalities can be most accurately measured and will provide a more equitable reimbursement for library services.

Figure 7 shows the impact this change would have had on the 2022 in-county budget request.

**Figure 5. True Non-Resident (TNR) Usage of Libraries in Waukesha County (2020 data) Physical Materials Only**

| Library         | Circulation to Waukesha County TNR |   | Total County Circulation |  | TNR Ratio |
|-----------------|------------------------------------|---|--------------------------|--|-----------|
| Big Bend        | 6,138                              | ÷ | 12,786                   |  | 48.01%    |
| Brookfield      | 30,551                             | ÷ | 501,073                  |  | 6.10%     |
| Butler          | 264                                | ÷ | 25,125                   |  | 1.05%     |
| Delafield       | 79,107                             | ÷ | 133,200                  |  | 59.39%    |
| Eagle           | 3,518                              | ÷ | 27,192                   |  | 12.94%    |
| Elm Grove       | 573                                | ÷ | 70,196                   |  | 0.82%     |
| Hartland        | 48,313                             | ÷ | 163,341                  |  | 29.58%    |
| Menomonee Falls | 5,405                              | ÷ | 219,760                  |  | 2.46%     |
| Mukwonago       | 97,671                             | ÷ | 185,814                  |  | 52.56%    |
| Muskego         | 8,257                              | ÷ | 162,991                  |  | 5.07%     |
| New Berlin      | 5,631                              | ÷ | 284,785                  |  | 1.98%     |
| North Lake      | 8,124                              | ÷ | 39,183                   |  | 20.73%    |
| Oconomowoc      | 64,433                             | ÷ | 189,607                  |  | 33.98%    |
| Pewaukee        | 22,189                             | ÷ | 209,397                  |  | 10.60%    |
| Sussex          | 86,102                             | ÷ | 243,242                  |  | 35.40%    |
| Waukesha        | 92,969                             | ÷ | 534,379                  |  | 17.40%    |

Figure 6. County Library Allowable Operating Costs 2021 for 2022 Budget

| Library                      | Allowable Costs for 2021 |
|------------------------------|--------------------------|
| Big Bend                     | \$74,567                 |
| Brookfield                   | \$3,040,182              |
| Butler                       | \$107,962                |
| Delafield                    | \$804,903                |
| Eagle                        | \$256,895                |
| Elm Grove                    | \$542,018                |
| Hartland                     | \$679,570                |
| Menomonee Falls              | \$1,990,227              |
| Mukwonago                    | \$984,750                |
| Muskego                      | \$1,359,077              |
| New Berlin                   | \$1,566,639              |
| North Lake                   | \$458,408                |
| Oconomowoc                   | \$1,228,428              |
| Pewaukee                     | \$1,201,725              |
| Sussex                       | \$1,161,099              |
| Waukesha                     | \$4,293,738              |
| <b>Total Allowable Costs</b> | <b>\$19,750,188</b>      |

Figure 7. Collection Formula for 2022 Budget

| Collection Formula                                    | TNR%    | x | Allowable Costs | = | In-County Budget Request |
|---|---------|---|-----------------|---|--------------------------|
| Countywide Totals (Physical Materials Only)           | 18.629% | x | \$19,750,188    | = | \$3,679,191              |
| Countywide Totals (Physical and Electronic Materials) | 19.182% | x | \$19,750,188    | = | \$3,788,564              |

As in past years, the county library planning committee’s review of the collection formula included discussion of the capital investments municipalities make in libraries and that there is no provision in the county library collection formula to offset any of the capital expenditures. The history of the county funding formula and previous significant efforts to include a capital component in the formula were discussed. The committee does not recommend change to the current collection formula, other than the inclusion of the circulation of electronic materials, but does acknowledge that the municipalities are making additional investments well beyond the operating costs to ensure that quality library facilities are available for use by all county

residents. This is especially true for those municipalities in Figure 5 with high TNR ratios, because their facilities must be sized to accommodate that use.

In addition to using county libraries, some Waukesha County residents use out-of-county libraries. Most citizens choose to use libraries that are convenient to their home, workplace, or school, irrespective of geographic/tax boundaries. Sometimes that library is across a county line. Wisconsin Act 420 was enacted in 2005 and became Wis. Stats. 43.12 that requires reimbursements across county lines. This law allows libraries to invoice an adjacent county when residents of a non-library community in that county borrow items from libraries across county borders. This provision is known as “cross-county payments” or “inter-county funding.” Libraries receive reimbursements based solely on the number of physical items checked out to the non-library community residents. Libraries must be paid at a rate of 70% of their operating costs based on circulation.

The Waukesha County library planning committee strongly supports inter-county payments at this level or higher as a fair and efficient way to extend library services across county lines. It is far less expensive to reimburse an existing library than to build and operate a new library. Several libraries in Waukesha County are situated in close proximity to one or more borders and provide significant services to citizens who live in areas without libraries in adjacent counties. Waukesha County libraries receive funding from those adjacent counties that is, in some cases, vital to their ongoing operations.

In 2021, the Waukesha County budget amount for inter-county funding was \$28,115. That amount was added to the county library budget request in accordance with Wis. Stats. 43.12, and paid to libraries in adjacent counties. By way of comparison, Waukesha County libraries received \$509,650 (in 2021) in funding from adjacent counties. As a result, it is in the interest of Waukesha County to vigorously protect this funding.

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

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

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

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

**Objective:** The regional library system staff will annually review all library allowable costs information and circulation data and prepare county library budget request based on certified data. Beginning with the 2023 budget request, circulation of both physical and electronic materials will be included in the collection formula calculation.

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

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

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

## Strategic Issue #4. County Funding Distribution Formula

The county library planning committee discussed in detail the formula prescribed in Waukesha County Ordinance 11-8 as shown in Appendix A. The details of the formula may be found here: <https://tinyurl.com/b74rv2wv>.

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

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

In the formula, a library is given credit for sharing its materials with other libraries. Sharing allows libraries to achieve local savings and reduces unnecessary duplication. To discourage libraries from relying too heavily on other libraries by not purchasing enough to meet local demand and to compensate libraries which build strong collections that are borrowed by residents of other library communities, interlibrary loan traffic is measured and factored into the distribution formula. How much a library sends versus how much the library borrows is netted and included as an element in the formula.

In the 2017-2021 Plan, an administrative change was made to the distribution formula. Instead of measuring the number of items transferred from one library to another (transits), the actual number of circulations of inter-library loan items within Waukesha County is the data element used. Because the automation system offers enough detailed reporting on the number of uses and ownership of materials at each library, this data can be recorded and used to more accurately measure a library's efforts to share with its partner libraries. Detailed information that showed the use of each library's materials for 2016 was analyzed and it was determined that this change offered the most accurate reflection of the data that gives credit to libraries that collect and share their materials.

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

Just as the committee recommends the circulation of both physical and electronic materials be included in the county collection formula, this is also the recommendation for the distribution formula. By including both forms of circulation, the library use by residents of non-library municipalities can be most accurately measured and funds distributed based on use.

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

**Goal:** Continue to fund the libraries in accordance with the statute and the county ordinance 11-8.

**Objective:** The regional library system will compile the data for the previous year's inter-library loan circulation data. Beginning with the 2023 budget request, circulation of both physical and electronic materials will be included in the distribution formula calculation.

## Strategic Issue #5. Standards

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

the following four standards: staffing level, hours of service, collection size, and materials expenditures.

In addition to the standards adopted, a Library Service Effort Ratio (LSER) was approved and is described in Section 11-5 of the County Code. The LSER allows libraries an alternative method of meeting requirements. A library community that does not meet its numerical standards can still claim exemption from the county library levy if it meets the LSER. The LSER is calculated by adding the number of item loans by a library to its own residents to the number of item loans to residents of other library communities and then dividing that sum by the total number of items borrowed by the residents of that municipality at all libraries in the county. The LSER allows library communities to retain exemption from the county library levy if their residents do most of their library business at home. According to the county plan, if most of a library's residents, most of the time, do most of their library business locally, the numerical standards will not apply. This is because residents will not be imposing any undue burden on neighboring libraries.

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

**Figure 8. LSER Library Data from 2020**

|                 | A                             | B  |   | C                           |   | D  | E  | F           |
|-----------------|-------------------------------|--|---|-----------------------------|---|--|--|-------------|
| Library         | Resident use of All Libraries | Library Lending to Other Library Community Residents |   | Resident Use of Own Library |   | Total Lending to Own Residents and Other Community Residents | Library Service Effort Ratio (Column D Divided by A) | Target Rate |
| Big Bend        | 9,111                         | 1,122  | + | 5,526                       | = | 6,648  | 72.97%   | 80%         |
| Brookfield      | 445,766                       | 74,190   | + | 396,332                     | = | 470,522  | 105.55%  | 95%         |
| Butler          | 12,369                        | 14,300   | + | 10,561                      | = | 24,861   | 200.99%  | 80%         |
| Delafield       | 51,008                        | 14,892   | + | 39,201                      | = | 54,093   | 106.05%  | 80%         |
| Eagle           | 31,756                        | 1,925  | + | 21,749                      | = | 23,674   | 74.55%   | 80%         |
| Elm Grove       | 61,573                        | 22,698   | + | 46,925                      | = | 69,623   | 113.07%  | 80%         |
| Hartland        | 85,718                        | 40,624   | + | 74,404                      | = | 115,028  | 134.19%  | 80%         |
| Menomonee Falls | 268,599                       | 8,083  | + | 206,272                     | = | 214,355  | 79.80%   | 95%         |
| Mukwonago       | 75,568                        | 16,035   | + | 72,108                      | = | 88,143   | 116.64%  | 80%         |
| Muskego         | 149,565                       | 13,477   | + | 141,257                     | = | 154,734  | 103.46%  | 90%         |
| New Berlin      | 284,565                       | 26,895   | + | 252,259                     | = | 279,154  | 98.10%   | 95%         |
| North Lake      | 55,347                        | 3,546  | + | 27,513                      | = | 31,059   | 56.12%   | 80%         |
| Oconomowoc      | 128,355                       | 11,173   | + | 114,001                     | = | 125,174  | 97.52%   | 90%         |
| Pewaukee        | 199,813                       | 35,817   | + | 151,391                     | = | 187,208  | 93.69%   | 90%         |
| Sussex          | 111,386                       | 53,663   | + | 103,477                     | = | 157,140  | 141.08%  | 90%         |
| Waukesha        | 472,327                       | 39,896   | + | 401,514                     | = | 441,410  | 93.45%   | 95%         |

Because larger libraries are assumed to be better able to address the needs of their own residents, population based LSER targets were developed. The population categories and target ratios are indicated in Figure 9.

Figure 9. LSER Target Ratios

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

The 2021 county library planning committee recommends that the LSER option for exemption be maintained without change.

In 2016, the county library planning committee focused a great deal of its attention on county library standards. Because the library standards had not been updated in nearly twenty years and because the plan vision was to build strong communities through strong libraries, the committee decided to recommend updating the standards as a part of the plan. A subcommittee was formed to investigate the details and report back to the committee. Libraries had changed profoundly, and the sub-committee was charged with the task of offering relevant standards with a sliding population scale instead of a target for a population range. The sub-committee held two lengthy meetings and brought back information to the Act 150 County Library Planning Committee for consideration.

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

The *Minimums to Exempt* are based on population of the library municipality, rather than by service area population, since the library’s municipality is the primary source of funding for libraries under the federated governance structure. Figure 10 lists the current population for each municipality.

Figure 10. Population of Waukesha County Library Municipalities, 2020 Census data.

| Library Municipality | Population of Municipality |
|----------------------|----------------------------|
| Big Bend             | 1,483                      |
| Brookfield           | 41,464                     |
| Butler               | 1,787                      |
| Delafield            | 7,185                      |
| Eagle                | 5,690                      |
| Elm Grove            | 6,513                      |
| Hartland             | 9,501                      |
| Menomonee Falls      | 38,527                     |
| Mukwonago            | 8,262                      |
| Muskego              | 25,032                     |
| New Berlin           | 40,451                     |
| North Lake           | 8,469                      |
| Oconomowoc           | 18,203                     |
| Pewaukee             | 24,152                     |
| Sussex               | 11,487                     |
| Waukesha             | 71,158                     |

After thorough review, the 2016 county library planning committee recommended a complete revision of the county library standards. The proposed *Minimums to Exempt* were no longer tied to the state library standards benchmarks. While the state was in the process of a major revision of the standards, the county library committee did not wish to wait for the state standards to be completed. Therefore, new benchmarks were proposed based on an analysis of actual Waukesha County-specific data based on discussions with county public librarians and citizen input. The committee recommended the adoption of new numerical minimums, the addition of two new measures, and the inclusion of checklist items for the purpose of quality assurance. Finally, the committee recommended that the LSER option for exemption be maintained without change.

The 2021 County Library Planning Committee carefully reviewed the *Minimums to Exempt* established in 2017. The recommendation is to retain each of the numerical standards, but with some adjustments based on inflationary increases in the cost of library materials, changes in community technology needs, and increased demand for electronic material. Additional quality assurance standards are also recommended by the committee. Details of all *Minimums to Exempt* and *Quality Assurance Standards* are included below.

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

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## Materials Expenditures Per Capita:

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Expenditures on library materials, and the size of libraries' physical collections have continued to change as a result of the growth in the size of digital collections. Yet despite the trend toward digital, libraries still have a significant demand for physical materials. In fact, physical circulation represents an average of 86% of circulation countywide. Libraries are expected to use their annual materials budget to build a relevant current collection that is reflective of and responsive to their local community. The materials expenditures per capita *Minimum to Exempt* measure is intended to ensure libraries meet the current needs of the community by requiring libraries annually invest a minimum funding level for the purchase of materials, including electronic materials, as determined by materials expenditures based on the size of the municipal population.

The recommended minimum benchmarks for materials expenditures per capita were thoroughly reviewed in the context of local budgets and funding constraints and inflationary increases since the previous plan was developed. In the previous plan, the first 10,000 of the population was calculated at the \$6.00 per capita amount and the decreased rate of \$5.00 per capita was calculated on the portion of the population over 10,000.

After, much discussion, the committee recommends that a change of \$0.25 per capita be phased in gradually in 2023 and 2024:

- 2022 – No change in per capita expenditure requirement.
- 2023 – Increase per capita expenditure for first 10,000 population to \$6.15 and portion of population above 10,000 to \$5.15.
- 2024 - Increase per capita expenditure for first 10,000 population to \$6.25 and portion of population above 10,000 to \$5.25.

The materials per capita Minimums to Exempt based on municipal population are shown in Figure 11. Individual library requirements are shown in Appendix C.

Figure 11. Materials Per Capita Minimums to Exempt

| Population | Expenditures /Capita 2022 | Materials Expenditures 2022 | Expenditures /Capita 2023 | Materials Expenditures 2023 | Expenditures /Capita 2024 | Materials Expenditures 2024 |
|------------|---------------------------|-----------------------------|---------------------------|-----------------------------|---------------------------|-----------------------------|
| 1,000      | \$6.00                    | \$6,000                     | \$6.15                    | \$6,150                     | \$6.25                    | \$6,250                     |
| 1,500      | \$6.00                    | \$9,000                     | \$6.15                    | \$9,225                     | \$6.25                    | \$9,375                     |
| 2,000      | \$6.00                    | \$12,000                    | \$6.15                    | \$12,300                    | \$6.25                    | \$12,500                    |
| 2,500      | \$6.00                    | \$15,000                    | \$6.15                    | \$15,375                    | \$6.25                    | \$15,625                    |
| 3,000      | \$6.00                    | \$18,000                    | \$6.15                    | \$18,450                    | \$6.25                    | \$18,750                    |
| 3,500      | \$6.00                    | \$21,000                    | \$6.15                    | \$21,525                    | \$6.25                    | \$21,875                    |
| 4,000      | \$6.00                    | \$24,000                    | \$6.15                    | \$24,600                    | \$6.25                    | \$25,000                    |
| 4,500      | \$6.00                    | \$27,000                    | \$6.15                    | \$27,675                    | \$6.25                    | \$28,125                    |
| 5,000      | \$6.00                    | \$30,000                    | \$6.15                    | \$30,750                    | \$6.25                    | \$31,250                    |
| 5,500      | \$6.00                    | \$33,000                    | \$6.15                    | \$33,825                    | \$6.25                    | \$34,375                    |
| 6,000      | \$6.00                    | \$36,000                    | \$6.15                    | \$36,900                    | \$6.25                    | \$37,500                    |
| 6,500      | \$6.00                    | \$39,000                    | \$6.15                    | \$39,975                    | \$6.25                    | \$40,625                    |
| 7,000      | \$6.00                    | \$42,000                    | \$6.15                    | \$43,050                    | \$6.25                    | \$43,750                    |
| 7,500      | \$6.00                    | \$45,000                    | \$6.15                    | \$46,125                    | \$6.25                    | \$46,875                    |
| 8,000      | \$6.00                    | \$48,000                    | \$6.15                    | \$49,200                    | \$6.25                    | \$50,000                    |
| 8,500      | \$6.00                    | \$51,000                    | \$6.15                    | \$52,275                    | \$6.25                    | \$53,125                    |
| 9,000      | \$6.00                    | \$54,000                    | \$6.15                    | \$55,350                    | \$6.25                    | \$56,250                    |
| 9,500      | \$6.00                    | \$57,000                    | \$6.15                    | \$58,425                    | \$6.25                    | \$59,375                    |
| 10,000+    | \$5.00                    | \$60,000                    | \$5.15                    | \$61,500                    | \$5.25                    | \$62,500                    |

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## Hours Open:

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The number of hours a library is open per week is an important factor in the level of service it is able to provide to citizens. Some libraries have reduced hours over the summer months in response to changes in community needs. Therefore, the requirement for the minimum number of hours open is represented in average hours per week during the school year. The minimums for the number of open library hours per week based on population are shown in Figure 12. Individual library requirements are shown in Appendix C.

**Figure 12: Winter Hours Open/Week Minimums**

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

## Full Time Staff Equivalent (FTE)

Libraries are service-based institutions, which means having adequate staffing levels is a key input measure. For a library to effectively serve its community, the number of full-time equivalent (FTE) staff should be related to the size of the population. It should be noted that the *Minimums to Exempt* benchmark is based on the number of staff budgeted, not actual employees. This allows for unforeseen circumstances such as staff vacancies.

The FTE requirements are shown in Figure 13. The minimum number recommended is 2.0 FTE staff members regardless of the size of the library’s community population. Having enough staff to handle daily operations is considered key to a library’s success. The rate of the incremental increase is reduced at several population points as shown in Figure 13. An increase of 1.0 FTE is recommended for each 1,000 of population above 2,000. Economies of scale are achieved once a library reaches a certain size. Therefore, the incremental rate of increase is reduced after a population hits the 10,000 mark. At that point, the changes in staff required grow at a rate of approximately .10 per 500 population. Once a population hits the 25,000 mark, the rate of increase is further reduced. At that population point, the increases in staff required are reduced to a rate of .0095 per 500 population. The three change points are highlighted in yellow in Figure 13.

The complete population table is shown in Appendix B. Individual library requirements are shown in Appendix C.

**Figure 13. FTE Staffing Levels Based on Population**

| Population | FTE Staffing Minimum Budget | Population | FTE Staffing Minimum Budget |
|------------|-----------------------------|------------|-----------------------------|
| 1,000      | 2.00                        | 12,500     | 10.51                       |
| 2,000      | 2.00                        | 13,000     | 10.62                       |
| 3,000      | 3.00                        | 13,500     | 10.73                       |
| 4,000      | 4.00                        | 14,000     | 10.84                       |
| 5,000      | 5.00                        | 14,500     | 10.94                       |
| 6,000      | 6.00                        | 15,000     | 11.05                       |
| 7,000      | 7.00                        | 15,500     | 11.17                       |
| 8,000      | 8.00                        | 16,000     | 11.28                       |
| 9,000      | 9.00                        | 16,500     | 11.39                       |
| 10,000     | 10.00                       | 17,000     | 11.51                       |
| 10,500     | 10.10                       | 17,500     | 11.62                       |
| 11,000     | 10.20                       | 18,000     | 11.74                       |
| 11,500     | 10.31                       | 18,500     | 11.86                       |
| 12,000     | 10.41                       | 19,000     | 11.98                       |

| Population | FTE Staffing<br>Minimum Budget |
|------------|--------------------------------|
| 19,500     | 12.10                          |
| 20,000     | 12.22                          |
| 20,500     | 12.34                          |
| 21,000     | 12.47                          |
| 21,500     | 12.59                          |
| 22,000     | 12.75                          |
| 22,500     | 12.85                          |
| 23,000     | 12.98                          |
| 23,500     | 13.11                          |
| 24,000     | 13.24                          |
| 24,500     | 13.38                          |
| 25,000     | 13.51                          |

| Population | FTE Staffing<br>Minimum Budget |
|------------|--------------------------------|
| 25,500     | 13.64                          |
| 26,000     | 13.77                          |
| 26,500     | 13.90                          |
| 27,000     | 14.03                          |
| 27,500     | 14.16                          |
| 28,000     | 14.30                          |
| 28,500     | 14.44                          |
| 29,000     | 14.57                          |
| 29,500     | 14.71                          |
| 30,000     | 14.85                          |
| 30,500     | 14.99                          |
| 31,000     | 15.13                          |

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## Collection Size

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This *Minimum to Exempt* only reflects the size of the library’s physical collection. While a library’s physical collection size continues to matter to citizens as a majority of patrons are still seeking physical materials, libraries continue to see an increase in the use of digital content. When the current plan was developed about 93% of circulation was physical materials. Based on year-to-date 2021 circulation statistics, it is estimated that 86% of total circulation will be physical materials, a change of 7%.

In the previous plan, the minimum collection size for a population of 2,500 or fewer was 14,000 items. The committee recommendation is to decrease this amount by 7.14% to 13,000, with the rest of the incremental changes remaining the same. At a population of 2,500 there is an incremental increase of 4,000 items per 500 population. At a population of 10,000, the incremental increase is reduced to 1,000 items per 500 population. At a population of 25,000 the increase is reduced to 800 items per 500 population. At a population of 50,000 the increase is reduced to 500 items per 500 population. The reduction in the base amount reduces the requirement for all libraries.

The change points are highlighted in Figure 14 below. Individual library requirements are shown in Appendix C.

**Figure 14. Collection Size Based on Population**

| Population    | Collection Size |
|---------------|-----------------|
| 1,000         | 13,000          |
| 1,500         | 13,000          |
| 2,000         | 13,000          |
| <b>2,500</b>  | <b>13,000</b>   |
| 3,000         | 17,000          |
| 3,500         | 21,000          |
| 4,000         | 25,000          |
| 4,500         | 29,000          |
| 5,000         | 33,000          |
| 5,500         | 37,000          |
| 6,000         | 41,000          |
| 6,500         | 45,000          |
| 7,000         | 49,000          |
| 7,500         | 53,000          |
| 8,000         | 57,000          |
| 8,500         | 61,000          |
| 9,000         | 65,000          |
| 9,500         | 69,000          |
| <b>10,000</b> | <b>73,000</b>   |
| 10,500        | 74,000          |
| 11,000        | 75,000          |
| 11,500        | 76,000          |
| 12,000        | 77,000          |
| 12,500        | 78,000          |
| 13,000        | 79,000          |
| 13,500        | 80,000          |
| 14,000        | 81,000          |
| 14,500        | 82,000          |
| 15,000        | 83,000          |
| 15,500        | 84,000          |
| 16,000        | 85,000          |
| 16,500        | 86,000          |
| 17,000        | 87,000          |
| 17,500        | 88,000          |
| 18,000        | 89,000          |

| Population    | Collection Size |
|---------------|-----------------|
| 18,500        | 90,000          |
| 19,000        | 91,000          |
| 19,500        | 92,000          |
| 20,000        | 93,000          |
| 20,500        | 94,000          |
| 21,000        | 95,000          |
| 21,500        | 96,000          |
| 22,000        | 97,000          |
| 22,500        | 98,000          |
| 23,000        | 99,000          |
| 23,500        | 100,000         |
| 24,000        | 101,000         |
| 24,500        | 102,000         |
| <b>25,000</b> | <b>103,000</b>  |
| 25,500        | 103,800         |
| 26,000        | 104,600         |
| 26,500        | 105,400         |
| 27,000        | 106,200         |
| 27,500        | 107,000         |
| 28,000        | 107,800         |
| 28,500        | 108,600         |
| 29,000        | 109,400         |
| 29,500        | 110,200         |
| 30,000        | 111,000         |
| 30,500        | 111,800         |
| 31,000        | 112,600         |
| 31,500        | 113,400         |
| 32,000        | 114,200         |
| 32,500        | 115,000         |
| 33,000        | 115,800         |
| 33,500        | 116,600         |
| 34,000        | 117,400         |
| 34,500        | 118,200         |
| 35,000        | 119,000         |
| 35,500        | 119,800         |

| Population | Collection Size |
|------------|-----------------|
| 36,000     | 120,600         |
| 36,500     | 121,400         |
| 37,000     | 122,200         |
| 37,500     | 123,000         |
| 38,000     | 123,800         |
| 38,500     | 124,600         |
| 39,000     | 125,400         |
| 39,500     | 126,200         |
| 40,000     | 127,000         |
| 40,500     | 127,800         |
| 41,000     | 128,600         |
| 41,500     | 129,400         |
| 42,000     | 130,200         |
| 42,500     | 131,000         |
| 43,000     | 131,800         |
| 43,500     | 132,600         |
| 44,000     | 133,400         |
| 44,500     | 134,200         |
| 45,000     | 135,000         |
| 45,500     | 135,800         |
| 46,000     | 136,600         |
| 46,500     | 137,400         |
| 47,000     | 138,200         |
| 47,500     | 139,000         |
| 48,000     | 139,800         |
| 48,500     | 140,600         |
| 49,000     | 141,400         |
| 49,500     | 142,200         |
| 50,000     | 143,000         |
| 50,500     | 143,500         |
| 51,000     | 144,000         |
| 51,500     | 144,500         |
| 52,000     | 145,000         |
| 52,500     | 145,500         |
| 53,000     | 146,000         |
| 53,500     | 146,500         |

| Population | Collection Size |
|------------|-----------------|
| 54,000     | 147,000         |
| 54,500     | 147,500         |
| 55,000     | 148,000         |
| 55,500     | 148,500         |
| 56,000     | 149,000         |
| 56,500     | 149,500         |
| 57,000     | 150,000         |
| 57,500     | 150,500         |
| 58,000     | 151,000         |
| 58,500     | 151,500         |
| 59,000     | 152,000         |
| 59,500     | 152,500         |
| 60,000     | 153,000         |
| 60,500     | 153,500         |
| 61,000     | 154,000         |
| 61,500     | 154,500         |
| 62,000     | 155,000         |
| 62,500     | 155,500         |
| 63,000     | 156,000         |
| 63,500     | 156,500         |
| 64,000     | 157,000         |
| 64,500     | 157,500         |
| 65,000     | 158,000         |
| 65,500     | 158,500         |
| 66,000     | 159,000         |
| 66,500     | 159,500         |
| 67,000     | 160,000         |
| 67,500     | 160,500         |
| 68,000     | 161,000         |
| 68,500     | 161,500         |
| 69,000     | 162,000         |
| 69,500     | 162,500         |
| 70,000     | 163,000         |
| 70,500     | 163,500         |
| 71,000     | 164,000         |

## Number of Public Internet Computers

In today’s technologically driven world, the library is an important source of public internet connectivity in the county. Libraries bridge the digital divide in their communities. While more and more Waukesha County residents bring their own devices to libraries, it is important to recognize that not all residents have equal ability to afford to do so, and to remember the library’s role in equalizing access.

A minimum number of public access internet computers based on population is recommended, but libraries have seen some decrease in demand for these computers in recent years. All devices available to the public with internet access, such as computers, laptops, and tablets qualify in a library’s count. The minimum number of computers for any size population is 2. In the previous plan, an increase of one computer for every 1,000 people was required until a library community population reaches 10,000. At that population size, the requirement was reduced to one computer for every 2,000 people. The committee recommends the minimum number of 2 computers be retained, but an increase of one computer for every 2,000 people be required beyond the minimum. Figure 15 shows the minimum numbers of public internet computers based on population

The requirements for all population sizes are shown in Appendix B. Individual library requirements are shown in Appendix C.

**Figure 15. Public Internet Computer Requirements.**

| Population | Computers/Internet Devices | Population | Computers/Internet Devices |
|------------|----------------------------|------------|----------------------------|
| 1,000      | 2                          | 7,000      | 4                          |
| 1,500      | 2                          | 7,500      | 4                          |
| 2,000      | 2                          | 8,000      | 5                          |
| 2,500      | 2                          | 8,500      | 5                          |
| 3,000      | 2                          | 9,000      | 5                          |
| 3,500      | 2                          | 9,500      | 5                          |
| 4,000      | 3                          | 10,000     | 6                          |
| 4,500      | 3                          | 10,500     | 6                          |
| 5,000      | 3                          | 11,000     | 6                          |
| 5,500      | 3                          | 11,500     | 6                          |
| 6,000      | 4                          | 12,000     | 7                          |
| 6,500      | 4                          | 12,500     | 7                          |

| Population | Computers/Internet Devices |
|------------|----------------------------|
| 13,000     | 7                          |
| 13,500     | 7                          |
| 14,000     | 8                          |
| 14,500     | 8                          |
| 15,000     | 8                          |
| 15,500     | 8                          |
| 16,000     | 9                          |
| 16,500     | 9                          |
| 17,000     | 9                          |
| 17,500     | 9                          |

| Population | Computers/Internet Devices |
|------------|----------------------------|
| 18,000     | 10                         |
| 18,500     | 10                         |
| 19,000     | 10                         |
| 19,500     | 10                         |
| 20,000     | 11                         |
| 20,500     | 11                         |
| 21,000     | 11                         |
| 21,500     | 11                         |
| 22,000     | 12                         |
| 22,500     | 12                         |

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## Wireless Internet Access

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Public wireless Internet access is extremely important for all libraries. Many people have their own devices and rely on libraries for their connection to the Internet. This *Minimum to Exempt* standard requires that county libraries of all size populations offer wireless Internet access as shown in Figure 16.

Figure 16. Wireless Access Requirement

| Population | Wireless Access |
|------------|-----------------|
| ≥1         | Yes             |

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## Quality Assurance Standards

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

The *Quality Assurance Standard* requiring the adoption or review of core library policies is new to the plan and recommended by the committee.

The recommended *Quality Assurance Standards* are:

- ❖ Library board members receive an orientation upon appointment to a library board.
- ❖ The library’s website includes contact information of key staff and board members as well as board agendas and minutes.
- ❖ The library board conducts an annual review of its library director.
- ❖ The library budget includes funding to ensure professional development for the library director and staff.
- ❖ The library has an active strategic plan.
- ❖ The library adopts the core policies included in the Wisconsin Public Library Tier One Standards: 1) Circulation, 2) Collection Management, 3) Computer/Internet Use, 4) Meeting Room Use (as necessary), and 5) Public Behavior (Rules of Conduct) 6) Personnel.

The recommended phase-in for implementation of the new core library policies *Quality Assurance Standard* is shown in Figure 17. Libraries that already have these policies in place would be expected to review each of these policies during the county library plan cycle.

Figure 17. Implementation Dates for Quality Assurance Items

| Quality Assurance Item                    | Effective Date                         |
|---|--|
| Circulation Policy                        | September 30, 2022 for 2023 exemption  |
| Collection Management Policy              | September 30, 2022, for 2023 exemption |
| Computer/Internet Use Policy              | September 30, 2023 for 2024 exemption  |
| Meeting Room Use Policy (as necessary)    | September 30, 2023 for 2024 exemption  |
| Public Behavior (Rules of Conduct) Policy | September 30, 2023 for 2024 exemption  |
| Personnel Policy                          | September 30, 2024 for 2025 exemption  |

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## Standards Implementation

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The new policy *Quality Assurance Standards* would become effective according to the schedule in Figure 17. The materials expenditure per capita *Minimum to Exempt* would become effective as described in that section of the plan. All other *Minimums to Exempt* and *Quality Assurance*

*Standards* are being recommended to take effect immediately upon adoption by the county board of supervisors and the libraries as required in Wis. Stats. 43.11(3)(d).

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

Libraries would be allowed a one-time exception during the county library plan cycle for each of the standards items, the numeric *Minimums to Exempt*, as well as the checklist *Quality Assurance Standards*. In other words, in one year, a library could not meet the staffing level and the planning requirements and still qualify for the county library tax exemption. However, the library would need to meet both of those requirements for the remaining four years of the plan. The following year, the library could not meet its materials expenditures requirement and still qualify for the exemption because it had not used an exception on this item in a previous year.

If conditions exist, such as the worldwide pandemic in 2020, that result in all or most libraries being unable to meet a particular standard, libraries will still be able to claim the exemption even if the one-time exception had been used previously. Additionally, any library that meets its LSER ratio (as previously described) automatically qualifies for the county library tax exemption relative to the *Minimums to Exempt* component of the requirement. Standards requirements are in addition to the library's municipal requirement to meet or exceed the county library tax.

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

- **February** - Libraries file state annual report indicating the necessary data for hours, staffing, materials collection size, materials spending, number of computers and wireless access for the previous year. Reports are due to the state by March 1.
- **May** – The regional library system distributes to each library a letter indicating the library's compliance with the *Minimums to Exempt* and LSER ratio based on the annual report of the previous year and the certification form approved by the library board that it intends to meet the *Minimums to Exempt* and the *Quality Assurance Standards* in the current year or provide a plan for return to compliance.
- **August** – Tax levy exemption information is distributed to libraries and municipalities in August. Exemption and standards compliance documentation is due by September 30 each year.

- **October** – The library system communicates to the county those municipalities that have met the requirements and are eligible to be exempt from the county library tax for the following year’s budget.
- **November** – Waukesha County Board of Supervisors sets the levy for the following budget year. The levy includes exemptions to the county library tax levy for communities with libraries that meet all criteria for exemption.

## Goals and Objectives for Strategic Issue #5 – Standards

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

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

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

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

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

## Strategic Issue #6. Library Establishment

There are 16 established public libraries in Waukesha County. Since 1986, our state law has required county approval for a township to establish a library or form a joint library with an existing library. However, cities and villages are not required to gain such approval. Municipalities with libraries can choose to abolish those libraries at any time.

State library law allows a county board to disallow a proposed library or a joint library that includes one or more towns because of the potential impact that change could have on the county library tax base. No such prohibition exists for cities and villages. They can form libraries or join with existing libraries when they see fit.

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

## Goals and Objectives for Strategic Issue #6 – Library Establishment

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

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

## Strategic Issue #7. Relationships with Others

While Act 150 and Act 420 provided much needed county funding for libraries in Wisconsin, Wis. Stats. 43.12 does not completely address the issue of non-resident use of municipal libraries. There are several exceptions that cause problems, especially in Waukesha County along the northern and eastern borders.

While Wisconsin law requires county funding for adjacent county library usage, Milwaukee County is excluded from the requirement. Communities that border Milwaukee County are free to serve or not serve Milwaukee County residents based on a local library board decision. Some libraries choose to serve residents of Milwaukee County because they believe the impact to be minimal and the commitment to open access worthy of an “open door” policy. Some libraries charge fees to residents of Milwaukee County in an attempt to receive some revenue from the residents for whom they are not being reimbursed with tax dollars. Other libraries choose not to serve Milwaukee County residents because they do not wish to have their residents subsidize people who are not at least partially funding the service.

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

Looking at the southern edge of Waukesha County, the regional library system board has a long-standing agreement in place with Lakeshores Library System that adequately addresses

the cross-county borrowing issues along the southern border. That agreement is between the two regional library systems and is reviewed/approved annually. On the western border, there are not significant issues that are not being adequately addressed by the provisions in Act 420.

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

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

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

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

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

## Strategic Issue #8. CAFÉ Shared Automation System

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

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

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

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

**Objective:** At least once during the plan, the regional library system will evaluate the effectiveness of CAFÉ from a user's perspective by conducting a user survey or other appropriate data collection methods.

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

## Strategic Issue #9. Regional Library System Membership and Services

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

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

services, the reliance on and expectation for services is likely greater than elsewhere in Wisconsin.

A statewide Public Library System Redesign (PLSR) Project to study ways library systems in Wisconsin can increase effectiveness and efficiencies was completed in 2018. Based on the study results and recommendations, it is safe to say that resource sharing and collaboration will continue to be key elements of regional library systems now and in the future. It is important for libraries and library systems to be engaged in the PLSR implementation process to keep our regional library systems strong and able to provide services to and for Waukesha County libraries.

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

**Goal:** Encourage the DPI Division for Libraries and Technology PLSR implementation team to focus its efforts on making improvements in library system effectiveness so that Waukesha County libraries benefit from increased services and a higher level of support.

**Objective:** The regional library system staff will engage in the PLSR implementation process to ensure that ideas for improvements are offered throughout the planning and implementation of each project recommendation.

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

## Plan Implementation

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

## Review of the Plan

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

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# Appendices

## Appendix A

### Current Waukesha County Code - Sec. 11-8 Library Tax Levy Distribution Formula

#### Sec. 11-8 Library Tax Levy Distribution Formula.

- (a) Purpose. To provide a fair, stable and clearly state County library tax levy distribution formula for the Waukesha County Library Planning Committee to utilize based on Non-Resident and net crossover borrowing/lending circulations.
- (b) Definitions. For purposes of this section:
1. *Non-Resident Library Circulation* shall mean the total annual amount of circulation that a Waukesha County Federated System library lends to residents of Waukesha County communities without libraries.
  2. *Crossover Lending Circulation* shall mean the lending of library materials, in person or by inter-library loan, by a Waukesha County Federated System library to residents of another Waukesha County Federated System library community.
  3. *Crossover Borrowing Circulation* shall mean the borrowing of library materials, in person or by inter-library loan, from a Waukesha County Federated System library by residents of another Waukesha County Federated System library community.
  4. *Net Crossover Circulation* shall mean a Waukesha County library community's total annual Crossover Lending Circulation, less its total annual Crossover Borrowing Circulation.
  5. *Library County Levy Circulation (LCC) Effort* shall mean the sum of a Waukesha County Federated System library community's total annual Non-Resident Library Circulation and Net Crossover Circulation.
  6. *Positive Library County Levy Circulation (LCC) Effort Rate* shall mean, for each Waukesha County Federated System library with a positive Library County Levy Circulation Effort, the proportion of the sum of all positive Library County Levy Circulation Effort.

7. *Circulation* shall mean materials borrowed from a library in the year prior to the year in which the Library Tax is levied.
  8. *Operating Expenditure per Circulation* shall mean the amount computed by dividing a library's total operating expenditures by its total circulation, using data from the year prior to the year in which the Library Tax is levied.
- (c) County Library Levy Distribution Formula. The levy distribution formula shall be determined using two separate allocations.
1. The first allocation for each library's annual share of the Waukesha County Library Levy will be based on s.43.12 (1), Wisconsin Statutes, which requires that each library receive an amount equal to at least 70% of their total operating expenditures, incurred during the year prior to the levy being imposed, multiplied by the proportion of the library's total circulation lent to Waukesha County Non-Residents.
  2. The second allocation for each library's annual share of the Waukesha County Library Levy shall be determined from the remaining annual levy after the first allocation. Only libraries with a positive LCC Effort are eligible for the second Library Levy allocation. The second allocation is determined by multiplying each library's County LCC Effort Rate by the remaining levy. This second allocation will be added to each library's first levy allocation in (1).
  3. To provide stability in funding, no library shall receive a decrease greater than 5% or \$5,000 of the levy distribution, based on the change from the prior year levy distribution, whichever is less, unless further adjustments to the limits are needed as identified in (5). A library will be limited to no greater than a 5% or \$5,000 increase from the prior year, unless it would result in an amount less than the first allocation in (1) or additional funds are available (for allocation in (4)) after complying with the requirements in this paragraph.
  4. County Library Levy remaining after adjustments in (3) will be allocated on the same basis as the second allocation in (2). If the stability adjustment in (3) results in a deficit, whereby the total distribution exceeds available Library Levy, libraries receiving increases in the second allocation after the File Number: 163-O-030 stability adjustment will have their preliminary increases reduced proportionately, until the total reduction is sufficient to offset the deficit. For any library receiving proportional reductions, the adjustment may not cause the following:
    - a. The library's distribution to be lower than its allocation in (1).

- b. The library's distribution to be a net decrease from the prior year.
5. During years when the decrease in total available Library Tax Levy produces a deficit in (4) large enough that [4(b)] cannot be satisfied, limits will be adjusted on allowable decreases in distributions to individual libraries by 5 percentage points and \$5,000, incrementally, until the deficit can be offset with proportional reductions in preliminary allocations to comply with [4(b)], with the exception that no individual library's reduction may exceed 25% of its prior year distribution.

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## Appendix B

### Minimum to Exempt for Each Service Factor Based on Municipal Population

| Population | Material Expenditures (2024) | Expenditures/ Capita (2024) | Hours Open | FTE   | Collection Size | Computers /Internet Devices |
|------------|------------------------------|-----------------------------|------------|-------|-----------------|-----------------------------|
| 1,000      | \$6,250                      | \$6.25                      | 35         | 2.00  | 13,000          | 2                           |
| 1,500      | \$9,375                      | \$6.25                      | 35         | 2.00  | 13,000          | 2                           |
| 2,000      | \$12,500                     | \$6.25                      | 35         | 2.00  | 13,000          | 2                           |
| 2,500      | \$15,625                     | \$6.25                      | 36         | 2.00  | 13,000          | 2                           |
| 3,000      | \$18,750                     | \$6.25                      | 38         | 3.00  | 17,000          | 3                           |
| 3,500      | \$21,875                     | \$6.25                      | 39         | 3.00  | 21,000          | 3                           |
| 4,000      | \$25,000                     | \$6.25                      | 40         | 4.00  | 25,000          | 3                           |
| 4,500      | \$28,125                     | \$6.25                      | 41         | 4.00  | 29,000          | 3                           |
| 5,000      | \$31,250                     | \$6.25                      | 43         | 5.00  | 33,000          | 4                           |
| 5,500      | \$34,375                     | \$6.25                      | 44         | 5.00  | 37,000          | 4                           |
| 6,000      | \$37,500                     | \$6.25                      | 45         | 6.00  | 41,000          | 4                           |
| 6,500      | \$40,625                     | \$6.25                      | 46         | 6.00  | 45,000          | 4                           |
| 7,000      | \$43,750                     | \$6.25                      | 48         | 7.00  | 49,000          | 5                           |
| 7,500      | \$46,875                     | \$6.25                      | 49         | 7.00  | 53,000          | 5                           |
| 8,000      | \$50,000                     | \$6.25                      | 50         | 8.00  | 57,000          | 5                           |
| 8,500      | \$53,125                     | \$6.25                      | 51         | 8.00  | 61,000          | 5                           |
| 9,000      | \$56,250                     | \$6.25                      | 53         | 9.00  | 65,000          | 6                           |
| 9,500      | \$59,375                     | \$6.25                      | 54         | 9.00  | 69,000          | 6                           |
| 10,000     | \$62,500                     | \$5.25                      | 55         | 10.00 | 73,000          | 6                           |
| 10,500     | \$65,125                     | \$5.25                      | 55         | 10.10 | 74,000          | 6                           |
| 11,000     | \$67,750                     | \$5.25                      | 55         | 10.20 | 75,000          | 7                           |
| 11,500     | \$70,375                     | \$5.25                      | 55         | 10.31 | 76,000          | 7                           |
| 12,000     | \$73,000                     | \$5.25                      | 55         | 10.41 | 77,000          | 7                           |
| 12,500     | \$75,625                     | \$5.25                      | 55         | 10.51 | 78,000          | 7                           |
| 13,000     | \$78,250                     | \$5.25                      | 55         | 10.62 | 79,000          | 8                           |
| 13,500     | \$80,875                     | \$5.25                      | 55         | 10.73 | 80,000          | 8                           |
| 14,000     | \$83,500                     | \$5.25                      | 55         | 10.84 | 81,000          | 8                           |
| 14,500     | \$86,125                     | \$5.25                      | 55         | 10.94 | 82,000          | 8                           |
| 15,000     | \$88,750                     | \$5.25                      | 56         | 11.05 | 83,000          | 9                           |
| 15,500     | \$91,375                     | \$5.25                      | 56         | 11.17 | 84,000          | 9                           |
| 16,000     | \$94,000                     | \$5.25                      | 56         | 11.28 | 85,000          | 9                           |
| 16,500     | \$96,625                     | \$5.25                      | 56         | 11.39 | 86,000          | 9                           |
| 17,000     | \$99,250                     | \$5.25                      | 56         | 11.51 | 87,000          | 10                          |
| 17,500     | \$101,875                    | \$5.25                      | 56         | 11.62 | 88,000          | 10                          |
| 18,000     | \$104,500                    | \$5.25                      | 56         | 11.74 | 89,000          | 10                          |

<sup>1</sup>MUNICIPAL population of library municipality (or, in the case of joint libraries, participating municipalities)

| Population | Material Expenditures (2024) | Expenditures/ Capita (2024) | Hours Open/Week | FTE Budgeted | Collection Size | Computers/ Internet Devices |
|------------|------------------------------|-----------------------------|-----------------|--------------|-----------------|-----------------------------|
| 18,500     | \$107,125                    | \$5.25                      | 56              | 11.86        | 90,000          | 10                          |
| 19,000     | \$109,750                    | \$5.25                      | 56              | 11.98        | 91,000          | 11                          |
| 19,500     | \$112,375                    | \$5.25                      | 56              | 12.10        | 92,000          | 11                          |
| 20,000     | \$115,000                    | \$5.25                      | 57              | 12.22        | 93,000          | 11                          |
| 20,500     | \$117,625                    | \$5.25                      | 57              | 12.34        | 94,000          | 11                          |
| 21,000     | \$120,250                    | \$5.25                      | 57              | 12.47        | 95,000          | 12                          |
| 21,500     | \$122,875                    | \$5.25                      | 57              | 12.59        | 96,000          | 12                          |
| 22,000     | \$125,500                    | \$5.25                      | 57              | 12.72        | 97,000          | 12                          |
| 22,500     | \$128,125                    | \$5.25                      | 57              | 12.85        | 98,000          | 12                          |
| 23,000     | \$130,750                    | \$5.25                      | 57              | 12.98        | 99,000          | 13                          |
| 23,500     | \$133,375                    | \$5.25                      | 57              | 13.11        | 100,000         | 13                          |
| 24,000     | \$136,000                    | \$5.25                      | 57              | 13.24        | 101,000         | 13                          |
| 24,500     | \$138,625                    | \$5.25                      | 57              | 13.38        | 102,000         | 13                          |
| 25,000     | \$141,250                    | \$5.25                      | 58              | 13.51        | 103,000         | 14                          |
| 25,500     | \$143,875                    | \$5.25                      | 58              | 13.64        | 103,800         | 14                          |
| 26,000     | \$146,500                    | \$5.25                      | 58              | 13.77        | 104,600         | 14                          |
| 26,500     | \$149,125                    | \$5.25                      | 58              | 13.90        | 105,400         | 14                          |
| 27,000     | \$151,750                    | \$5.25                      | 58              | 14.03        | 106,200         | 15                          |
| 27,500     | \$154,375                    | \$5.25                      | 58              | 14.16        | 107,000         | 15                          |
| 28,000     | \$157,000                    | \$5.25                      | 58              | 14.30        | 107,800         | 15                          |
| 28,500     | \$159,625                    | \$5.25                      | 58              | 14.44        | 108,600         | 15                          |
| 29,000     | \$162,250                    | \$5.25                      | 58              | 14.57        | 109,400         | 16                          |
| 29,500     | \$164,875                    | \$5.25                      | 58              | 14.71        | 110,200         | 16                          |
| 30,000     | \$167,500                    | \$5.25                      | 59              | 14.85        | 111,000         | 16                          |
| 30,500     | \$170,125                    | \$5.25                      | 59              | 14.99        | 111,800         | 16                          |
| 31,000     | \$172,750                    | \$5.25                      | 59              | 15.13        | 112,600         | 17                          |
| 31,500     | \$175,375                    | \$5.25                      | 59              | 15.28        | 113,400         | 17                          |
| 32,000     | \$178,000                    | \$5.25                      | 59              | 15.42        | 114,200         | 17                          |
| 32,500     | \$180,625                    | \$5.25                      | 59              | 15.57        | 115,000         | 17                          |
| 33,000     | \$183,250                    | \$5.25                      | 59              | 15.72        | 115,800         | 18                          |
| 33,500     | \$185,875                    | \$5.25                      | 59              | 15.87        | 116,600         | 18                          |
| 34,000     | \$188,500                    | \$5.25                      | 59              | 16.02        | 117,400         | 18                          |
| 34,500     | \$191,125                    | \$5.25                      | 59              | 16.17        | 118,200         | 18                          |
| 35,000     | \$193,750                    | \$5.25                      | 60              | 16.32        | 119,000         | 19                          |
| 35,500     | \$196,375                    | \$5.25                      | 60              | 16.48        | 119,800         | 19                          |
| 36,000     | \$199,000                    | \$5.25                      | 60              | 16.63        | 120,600         | 19                          |
| 36,500     | \$201,625                    | \$5.25                      | 60              | 16.79        | 121,400         | 19                          |

<sup>1</sup>MUNICIPAL population of library municipality (or, in the case of joint libraries, participating municipalities)

| Population | Material Expenditures (2024) | Expenditures/ Capita (2024) | Hours Open/Week | FTE Budgeted | Collection Size | Computers/ Internet Devices |
|------------|------------------------------|-----------------------------|-----------------|--------------|-----------------|-----------------------------|
| 37,000     | \$204,250                    | \$5.25                      | 60              | 16.95        | 122,200         | 20                          |
| 37,500     | \$206,875                    | \$5.25                      | 60              | 17.11        | 123,000         | 20                          |
| 38,000     | \$209,500                    | \$5.25                      | 60              | 17.28        | 123,800         | 20                          |
| 38,500     | \$212,125                    | \$5.25                      | 60              | 17.44        | 124,600         | 20                          |
| 39,000     | \$214,750                    | \$5.25                      | 60              | 17.61        | 125,400         | 21                          |
| 39,500     | \$217,375                    | \$5.25                      | 60              | 17.77        | 126,200         | 21                          |
| 40,000     | \$220,000                    | \$5.25                      | 60              | 17.94        | 127,000         | 21                          |
| 40,500     | \$222,625                    | \$5.25                      | 60              | 18.11        | 127,800         | 21                          |
| 41,000     | \$225,250                    | \$5.25                      | 60              | 18.28        | 128,600         | 22                          |
| 41,500     | \$227,875                    | \$5.25                      | 60              | 18.46        | 129,400         | 22                          |
| 42,000     | \$230,500                    | \$5.25                      | 60              | 18.63        | 130,200         | 22                          |
| 42,500     | \$233,125                    | \$5.25                      | 60              | 18.81        | 131,000         | 22                          |
| 43,000     | \$235,750                    | \$5.25                      | 60              | 18.99        | 131,800         | 23                          |
| 43,500     | \$238,375                    | \$5.25                      | 60              | 19.17        | 132,600         | 23                          |
| 44,000     | \$241,000                    | \$5.25                      | 60              | 19.35        | 133,400         | 23                          |
| 44,500     | \$243,625                    | \$5.25                      | 60              | 19.54        | 134,200         | 23                          |
| 45,000     | \$246,250                    | \$5.25                      | 60              | 19.72        | 135,000         | 24                          |
| 45,500     | \$248,875                    | \$5.25                      | 60              | 19.91        | 135,800         | 24                          |
| 46,000     | \$251,500                    | \$5.25                      | 60              | 20.10        | 136,600         | 24                          |
| 46,500     | \$254,125                    | \$5.25                      | 60              | 20.29        | 137,400         | 24                          |
| 47,000     | \$256,750                    | \$5.25                      | 60              | 20.48        | 138,200         | 25                          |
| 47,500     | \$259,375                    | \$5.25                      | 60              | 20.68        | 139,000         | 25                          |
| 48,000     | \$262,000                    | \$5.25                      | 60              | 20.87        | 139,800         | 25                          |
| 48,500     | \$264,625                    | \$5.25                      | 60              | 21.07        | 140,600         | 25                          |
| 49,000     | \$267,250                    | \$5.25                      | 60              | 21.27        | 141,400         | 26                          |
| 49,500     | \$269,875                    | \$5.25                      | 60              | 21.47        | 142,200         | 26                          |
| 50,000     | \$272,500                    | \$5.25                      | 60              | 21.68        | 143,000         | 26                          |
| 50,500     | \$275,125                    | \$5.25                      | 60              | 21.88        | 143,500         | 26                          |
| 51,000     | \$277,750                    | \$5.25                      | 60              | 22.09        | 144,000         | 27                          |
| 51,500     | \$280,375                    | \$5.25                      | 60              | 22.30        | 144,500         | 27                          |
| 52,000     | \$283,000                    | \$5.25                      | 60              | 22.51        | 145,000         | 27                          |
| 52,500     | \$285,625                    | \$5.25                      | 60              | 22.73        | 145,500         | 27                          |
| 53,000     | \$288,250                    | \$5.25                      | 60              | 22.94        | 146,000         | 28                          |
| 53,500     | \$290,875                    | \$5.25                      | 60              | 23.16        | 146,500         | 28                          |

<sup>1</sup>MUNICIPAL population of library municipality (or, in the case of joint libraries, participating municipalities)

| Population | Material Expenditures (2024) | Expenditures/ Capita (2024) | Hours Open/Week | FTE Budgeted | Collection Size | Computers/ Internet Devices |
|------------|------------------------------|-----------------------------|-----------------|--------------|-----------------|-----------------------------|
| 54,000     | \$293,500                    | \$5.25                      | 60              | 23.38        | 147,000         | 28                          |
| 54,500     | \$296,125                    | \$5.25                      | 60              | 23.60        | 147,500         | 28                          |
| 55,000     | \$298,750                    | \$5.25                      | 60              | 23.83        | 148,000         | 29                          |
| 55,500     | \$301,375                    | \$5.25                      | 60              | 24.05        | 148,500         | 29                          |
| 56,000     | \$304,000                    | \$5.25                      | 60              | 24.28        | 149,000         | 29                          |
| 56,500     | \$306,625                    | \$5.25                      | 60              | 24.51        | 149,500         | 29                          |
| 57,000     | \$309,250                    | \$5.25                      | 60              | 24.74        | 150,000         | 30                          |
| 57,500     | \$311,875                    | \$5.25                      | 60              | 24.98        | 150,500         | 30                          |
| 58,000     | \$314,500                    | \$5.25                      | 60              | 25.22        | 151,000         | 30                          |
| 58,500     | \$317,125                    | \$5.25                      | 60              | 25.46        | 151,500         | 30                          |
| 59,000     | \$319,750                    | \$5.25                      | 60              | 25.70        | 152,000         | 31                          |
| 59,500     | \$322,375                    | \$5.25                      | 60              | 25.94        | 152,500         | 31                          |
| 60,000     | \$325,000                    | \$5.25                      | 60              | 26.19        | 153,000         | 31                          |
| 60,500     | \$327,625                    | \$5.25                      | 60              | 26.44        | 153,500         | 31                          |
| 61,000     | \$330,250                    | \$5.25                      | 60              | 26.69        | 154,000         | 32                          |
| 61,500     | \$332,875                    | \$5.25                      | 60              | 26.94        | 154,500         | 32                          |
| 62,000     | \$335,500                    | \$5.25                      | 60              | 27.20        | 155,000         | 32                          |
| 62,500     | \$338,125                    | \$5.25                      | 60              | 27.46        | 155,500         | 32                          |
| 63,000     | \$340,750                    | \$5.25                      | 60              | 27.72        | 156,000         | 33                          |
| 63,500     | \$343,375                    | \$5.25                      | 60              | 27.98        | 156,500         | 33                          |
| 64,000     | \$346,000                    | \$5.25                      | 60              | 28.25        | 157,000         | 33                          |
| 64,500     | \$348,625                    | \$5.25                      | 60              | 28.51        | 157,500         | 33                          |
| 65,000     | \$351,250                    | \$5.25                      | 60              | 28.79        | 158,000         | 34                          |
| 65,500     | \$353,875                    | \$5.25                      | 60              | 29.06        | 158,500         | 34                          |
| 66,000     | \$356,500                    | \$5.25                      | 60              | 29.34        | 159,000         | 34                          |
| 66,500     | \$359,125                    | \$5.25                      | 60              | 29.61        | 159,500         | 34                          |
| 67,000     | \$361,750                    | \$5.25                      | 60              | 29.90        | 160,000         | 35                          |
| 67,500     | \$364,375                    | \$5.25                      | 60              | 30.18        | 160,500         | 35                          |
| 68,000     | \$367,000                    | \$5.25                      | 60              | 30.47        | 161,000         | 35                          |
| 68,500     | \$369,625                    | \$5.25                      | 60              | 30.76        | 161,500         | 35                          |
| 69,000     | \$372,250                    | \$5.25                      | 60              | 31.05        | 162,000         | 36                          |
| 69,500     | \$374,875                    | \$5.25                      | 60              | 31.34        | 162,500         | 36                          |
| 70,000     | \$377,500                    | \$5.25                      | 60              | 31.64        | 163,000         | 36                          |
| 70,500     | \$380,125                    | \$5.25                      | 60              | 31.94        | 163,500         | 36                          |
| 71,000     | \$382,750                    | \$5.25                      | 60              | 32.24        | 164,000         | 37                          |
| 71,500     | \$385,375                    | \$5.25                      | 60              | 32.55        | 164,500         | 37                          |
| 72,000     | \$388,000                    | \$5.25                      | 60              | 32.86        | 165,000         | 37                          |

<sup>1</sup>MUNICIPAL population of library municipality (or, in the case of joint libraries, participating municipalities)

| Population | Material Expenditures (2024) | Expenditures/ Capita (2024) | Hours Open/Week | FTE Budgeted | Collection Size | Computers/ Internet Devices |
|------------|------------------------------|-----------------------------|-----------------|--------------|-----------------|-----------------------------|
| 72,500     | \$390,625                    | \$5.25                      | 60              | 33.17        | 165,500         | 37                          |
| 73,000     | \$393,250                    | \$5.25                      | 60              | 33.49        | 166,000         | 38                          |
| 73,500     | \$395,875                    | \$5.25                      | 60              | 33.81        | 166,500         | 38                          |
| 74,000     | \$398,500                    | \$5.25                      | 60              | 34.13        | 167,000         | 38                          |
| 74,500     | \$401,125                    | \$5.25                      | 60              | 34.45        | 167,500         | 38                          |
| 75,000     | \$403,750                    | \$5.25                      | 60              | 34.78        | 168,000         | 39                          |
| 75,500     | \$406,375                    | \$5.25                      | 60              | 35.11        | 168,500         | 39                          |
| 76,000     | \$409,000                    | \$5.25                      | 60              | 35.44        | 169,000         | 39                          |
| 76,500     | \$411,625                    | \$5.25                      | 60              | 35.78        | 169,500         | 39                          |
| 77,000     | \$414,250                    | \$5.25                      | 60              | 36.12        | 170,000         | 40                          |
| 77,500     | \$416,875                    | \$5.25                      | 60              | 36.46        | 170,500         | 40                          |
| 78,000     | \$419,500                    | \$5.25                      | 60              | 36.81        | 171,000         | 40                          |
| 78,500     | \$422,125                    | \$5.25                      | 60              | 37.16        | 171,500         | 40                          |
| 79,000     | \$424,750                    | \$5.25                      | 60              | 37.51        | 172,000         | 41                          |
| 79,500     | \$427,375                    | \$5.25                      | 60              | 37.87        | 172,500         | 41                          |
| 80,000     | \$430,000                    | \$5.25                      | 60              | 38.23        | 173,000         | 41                          |
| 80,500     | \$432,625                    | \$5.25                      | 60              | 38.59        | 173,500         | 41                          |
| 81,000     | \$435,250                    | \$5.25                      | 60              | 38.96        | 174,000         | 42                          |
| 81,500     | \$437,875                    | \$5.25                      | 60              | 39.33        | 174,500         | 42                          |
| 82,000     | \$440,500                    | \$5.25                      | 60              | 39.70        | 175,000         | 42                          |
| 82,500     | \$443,125                    | \$5.25                      | 60              | 40.08        | 175,500         | 42                          |
| 83,000     | \$445,750                    | \$5.25                      | 60              | 40.46        | 176,000         | 43                          |
| 83,500     | \$448,375                    | \$5.25                      | 60              | 40.84        | 176,500         | 43                          |
| 84,000     | \$451,000                    | \$5.25                      | 60              | 41.23        | 177,000         | 43                          |
| 84,500     | \$453,625                    | \$5.25                      | 60              | 41.62        | 177,500         | 43                          |
| 85,000     | \$456,250                    | \$5.25                      | 60              | 42.02        | 178,000         | 44                          |
| 85,500     | \$458,875                    | \$5.25                      | 60              | 42.42        | 178,500         | 44                          |
| 86,000     | \$461,500                    | \$5.25                      | 60              | 42.82        | 179,000         | 44                          |
| 86,500     | \$464,125                    | \$5.25                      | 60              | 43.23        | 179,500         | 44                          |
| 87,000     | \$466,750                    | \$5.25                      | 60              | 43.64        | 180,000         | 45                          |
| 87,500     | \$469,375                    | \$5.25                      | 60              | 44.05        | 180,500         | 45                          |
| 88,000     | \$472,000                    | \$5.25                      | 60              | 44.47        | 181,000         | 45                          |
| 88,500     | \$474,625                    | \$5.25                      | 60              | 44.89        | 181,500         | 45                          |
| 89,000     | \$477,250                    | \$5.25                      | 60              | 45.32        | 182,000         | 46                          |
| 89,500     | \$479,875                    | \$5.25                      | 60              | 45.75        | 182,500         | 46                          |
| 90,000     | \$482,500                    | \$5.25                      | 60              | 46.18        | 183,000         | 46                          |

<sup>1</sup>MUNICIPAL population of library municipality (or, in the case of joint libraries, participating municipalities)

## Appendix C

**New Minimums vs. Actuals for Waukesha County Libraries based on 2020 Data (data will be updated annually). Materials Spending per Capita will increase \$0.15 in 2023 and an additional \$0.10 to \$0.25 in 2024.**

|   |                 |                                     |               |                      |
|---|-----------------|-------------------------------------|---------------|----------------------|
| <b>Library</b>                                  | <b>Big Bend</b> | <b>Population</b>                   | 1,483         |                      |
|   |                 | <b>Actual Material Expenditures</b> | \$11,022      |                      |
| <b>Category</b>                                 |                 | <b>Minimum To Exempt</b>            | <b>Actual</b> | <b>Pass (Yes/No)</b> |
| <b>\$ Materials/Capita</b>                      |                 | \$6.00                              | \$7.43        | YES                  |
| <b>Hours Open</b>                               |                 | 35                                  | 40            | YES                  |
| <b>FTE</b>                                      |                 | 2.00                                | 2.00          | YES                  |
| <b>Collection Size</b>                          |                 | 13,000                              | 14,514        | YES                  |
| <b>Public Computers/Internet Access Devices</b> |                 | 2                                   | 3             | YES                  |
| <b>Wireless Internet Access</b>                 |                 | Yes                                 | Yes           | YES                  |

|   |                   |                                     |               |                      |
|---|-------------------|-------------------------------------|---------------|----------------------|
| <b>Library</b>                                  | <b>Brookfield</b> | <b>Population</b>                   | 41,464        |                      |
|   |                   | <b>Actual Material Expenditures</b> | \$437,961     |                      |
| <b>Category</b>                                 |                   | <b>Minimum To Exempt</b>            | <b>Actual</b> | <b>Pass (Yes/No)</b> |
| <b>\$ Materials/Capita</b>                      |                   | \$5.24                              | \$10.56       | YES                  |
| <b>Hours Open</b>                               |                   | 60                                  | 51            | NO                   |
| <b>FTE</b>                                      |                   | 18.28                               | 30.38         | YES                  |
| <b>Collection Size</b>                          |                   | 128,600                             | 188,930       | YES                  |
| <b>Public Computers/Internet Access Devices</b> |                   | 22                                  | 72            | YES                  |
| <b>Wireless Internet Access</b>                 |                   | Yes                                 | Yes           | YES                  |

|   |               |                                     |               |                      |
|---|---------------|-------------------------------------|---------------|----------------------|
| <b>Library</b>                                  | <b>Butler</b> | <b>Population</b>                   | 1,787         |                      |
|   |               | <b>Actual Material Expenditures</b> | \$11,080      |                      |
| <b>Category</b>                                 |               | <b>Minimum To Exempt</b>            | <b>Actual</b> | <b>Pass (Yes/No)</b> |
| <b>\$ Materials/Capita</b>                      |               | \$6.00                              | \$6.20        | YES                  |
| <b>Hours Open</b>                               |               | 35                                  | 32            | NO                   |
| <b>FTE</b>                                      |               | 2.00                                | 2.20          | YES                  |
| <b>Collection Size</b>                          |               | 13,000                              | 26,854        | YES                  |
| <b>Public Computers/Internet Access Devices</b> |               | 2                                   | 8             | YES                  |
| <b>Wireless Internet Access</b>                 |               | Yes                                 | Yes           | YES                  |

|   |                  |                                     |               |                      |
|---|------------------|-------------------------------------|---------------|----------------------|
| <b>Library</b>                                  | <b>Delafield</b> | <b>Population</b>                   | 7,185         |                      |
|   |                  | <b>Actual Material Expenditures</b> | \$79,224      |                      |
| <b>Category</b>                                 |                  | <b>Minimum To Exempt</b>            | <b>Actual</b> | <b>Pass (Yes/No)</b> |
| <b>\$ Materials/Capita</b>                      |                  | \$6.00                              | \$11.03       | YES                  |
| <b>Hours Open</b>                               |                  | 48                                  | 43            | NO                   |
| <b>FTE</b>                                      |                  | 7.00                                | 10.33         | YES                  |
| <b>Collection Size</b>                          |                  | 49,000                              | 79,947        | YES                  |
| <b>Public Computers/Internet Access Devices</b> |                  | 5                                   | 15            | YES                  |
| <b>Wireless Internet Access</b>                 |                  | Yes                                 | Yes           | YES                  |

|   |              |                                     |               |                      |
|---|--------------|-------------------------------------|---------------|----------------------|
| <b>Library</b>                                  | <b>Eagle</b> | <b>Population</b>                   | 5,690         |                      |
|   |              | <b>Actual Material Expenditures</b> | \$38,915      |                      |
| <b>Category</b>                                 |              | <b>Minimum To Exempt</b>            | <b>Actual</b> | <b>Pass (Yes/No)</b> |
| <b>\$ Materials/Capita</b>                      |              | \$6.00                              | \$6.84        | YES                  |
| <b>Hours Open</b>                               |              | 44                                  | 41            | NO                   |
| <b>FTE</b>                                      |              | 5.00                                | 5.53          | YES                  |
| <b>Collection Size</b>                          |              | 37,000                              | 39,727        | YES                  |
| <b>Public Computers/Internet Access Devices</b> |              | 4                                   | 7             | YES                  |
| <b>Wireless Internet Access</b>                 |              | Yes                                 | Yes           | YES                  |

|   |                  |                                     |               |                      |
|---|------------------|-------------------------------------|---------------|----------------------|
| <b>Library</b>                                  | <b>Elm Grove</b> | <b>Population</b>                   | 6,513         |                      |
|   |                  | <b>Actual Material Expenditures</b> | \$79,754      |                      |
| <b>Category</b>                                 |                  | <b>Minimum To Exempt</b>            | <b>Actual</b> | <b>Pass (Yes/No)</b> |
| <b>\$ Materials/Capita</b>                      |                  | \$6.00                              | \$12.25       | YES                  |
| <b>Hours Open</b>                               |                  | 46                                  | 37            | NO                   |
| <b>FTE</b>                                      |                  | 6.00                                | 5.91          | NO                   |
| <b>Collection Size</b>                          |                  | 45,000                              | 64,278        | YES                  |
| <b>Public Computers/Internet Access Devices</b> |                  | 4                                   | 6             | YES                  |
| <b>Wireless Internet Access</b>                 |                  | Yes                                 | Yes           | YES                  |

|   |                 |                                     |               |                      |
|---|-----------------|-------------------------------------|---------------|----------------------|
| <b>Library</b>                                  | <b>Hartland</b> | <b>Population</b>                   | 9,501         |                      |
|   |                 | <b>Actual Material Expenditures</b> | \$87,100      |                      |
| <b>Category</b>                                 |                 | <b>Minimum To Exempt</b>            | <b>Actual</b> | <b>Pass (Yes/No)</b> |
| <b>\$ Materials/Capita</b>                      |                 | \$6.00                              | \$9.17        | YES                  |
| <b>Hours Open</b>                               |                 | 54                                  | 49            | NO                   |
| <b>FTE</b>                                      |                 | 9.00                                | 9.81          | YES                  |
| <b>Collection Size</b>                          |                 | 69,000                              | 77,109        | YES                  |
| <b>Public Computers/Internet Access Devices</b> |                 | 6                                   | 10            | YES                  |
| <b>Wireless Internet Access</b>                 |                 | Yes                                 | Yes           | YES                  |

|   |                        |                                     |               |                      |
|---|------------------------|-------------------------------------|---------------|----------------------|
| <b>Library</b>                                  | <b>Menomonee Falls</b> | <b>Population</b>                   | 38,527        |                      |
|   |                        | <b>Actual Material Expenditures</b> | \$207,558     |                      |
| <b>Category</b>                                 |                        | <b>Minimum To Exempt</b>            | <b>Actual</b> | <b>Pass (Yes/No)</b> |
| <b>\$ Materials/Capita</b>                      |                        | \$5.26                              | \$5.39        | YES                  |
| <b>Hours Open</b>                               |                        | 60                                  | 54            | NO                   |
| <b>FTE</b>                                      |                        | 17.44                               | 20.61         | YES                  |
| <b>Collection Size</b>                          |                        | 124,600                             | 124,430       | NO                   |
| <b>Public Computers/Internet Access Devices</b> |                        | 20                                  | 52            | YES                  |
| <b>Wireless Internet Access</b>                 |                        | Yes                                 | Yes           | YES                  |

|   |                  |                                     |               |                      |
|---|------------------|-------------------------------------|---------------|----------------------|
| <b>Library</b>                                  | <b>Mukwonago</b> | <b>Population</b>                   | 8,262         |                      |
|   |                  | <b>Actual Material Expenditures</b> | \$77,883      |                      |
| <b>Category</b>                                 |                  | <b>Minimum To Exempt</b>            | <b>Actual</b> | <b>Pass (Yes/No)</b> |
| <b>\$ Materials/Capita</b>                      |                  | \$6.00                              | \$9.43        | YES                  |
| <b>Hours Open</b>                               |                  | 50                                  | 50            | YES                  |
| <b>FTE</b>                                      |                  | 8.00                                | 13.66         | YES                  |
| <b>Collection Size</b>                          |                  | 57,000                              | 98,876        | YES                  |
| <b>Public Computers/Internet Access Devices</b> |                  | 5                                   | 36            | YES                  |
| <b>Wireless Internet Access</b>                 |                  | Yes                                 | Yes           | YES                  |

|   |                |                                     |               |                      |
|---|----------------|-------------------------------------|---------------|----------------------|
| <b>Library</b>                                  | <b>Muskego</b> | <b>Population</b>                   | 25,032        |                      |
|   |                | <b>Actual Material Expenditures</b> | \$159,559     |                      |
| <b>Category</b>                                 |                | <b>Minimum To Exempt</b>            | <b>Actual</b> | <b>Pass (Yes/No)</b> |
| <b>\$ Materials/Capita</b>                      |                | \$5.40                              | \$6.37        | YES                  |
| <b>Hours Open</b>                               |                | 58                                  | 56            | NO                   |
| <b>FTE</b>                                      |                | 13.51                               | 14.30         | YES                  |
| <b>Collection Size</b>                          |                | 103,000                             | 125,928       | YES                  |
| <b>Public Computers/Internet Access Devices</b> |                | 14                                  | 18            | YES                  |
| <b>Wireless Internet Access</b>                 |                | Yes                                 | Yes           | YES                  |

|   |                   |                                     |               |                      |
|---|-------------------|-------------------------------------|---------------|----------------------|
| <b>Library</b>                                  | <b>New Berlin</b> | <b>Population</b>                   | 40,451        |                      |
|   |                   | <b>Actual Material Expenditures</b> | \$239,599     |                      |
| <b>Category</b>                                 |                   | <b>Minimum To Exempt</b>            | <b>Actual</b> | <b>Pass (Yes/No)</b> |
| <b>\$ Materials/Capita</b>                      |                   | \$5.25                              | \$5.92        | YES                  |
| <b>Hours Open</b>                               |                   | 60                                  | 62            | YES                  |
| <b>FTE</b>                                      |                   | 17.94                               | 19.35         | YES                  |
| <b>Collection Size</b>                          |                   | 127,000                             | 147,965       | YES                  |
| <b>Public Computers/Internet Access Devices</b> |                   | 21                                  | 40            | YES                  |
| <b>Wireless Internet Access</b>                 |                   | Yes                                 | Yes           | YES                  |

|   |                   |                                     |               |                      |
|---|-------------------|-------------------------------------|---------------|----------------------|
| <b>Library</b>                                  | <b>North Lake</b> | <b>Population</b>                   | 8,469         |                      |
|   |                   | <b>Actual Material Expenditures</b> | \$58,548      |                      |
| <b>Category</b>                                 |                   | <b>Minimum To Exempt</b>            | <b>Actual</b> | <b>Pass (Yes/No)</b> |
| <b>\$ Materials/Capita</b>                      |                   | \$6.00                              | \$6.91        | YES                  |
| <b>Hours Open</b>                               |                   | 50                                  | 47            | NO                   |
| <b>FTE</b>                                      |                   | 8.00                                | 9.92          | YES                  |
| <b>Collection Size</b>                          |                   | 57,000                              | 69,145        | YES                  |
| <b>Public Computers/Internet Access Devices</b> |                   | 5                                   | 9             | YES                  |
| <b>Wireless Internet Access</b>                 |                   | Yes                                 | Yes           | YES                  |

|   |                   |                                     |               |                      |
|---|-------------------|-------------------------------------|---------------|----------------------|
| <b>Library</b>                                  | <b>Oconomowoc</b> | <b>Population</b>                   | 18,203        |                      |
|   |                   | <b>Actual Material Expenditures</b> | \$134,353     |                      |
| <b>Category</b>                                 |                   | <b>Minimum To Exempt</b>            | <b>Actual</b> | <b>Pass (Yes/No)</b> |
| <b>\$ Materials/Capita</b>                      |                   | \$5.55                              | \$7.38        | YES                  |
| <b>Hours Open</b>                               |                   | 56                                  | 50            | NO                   |
| <b>FTE</b>                                      |                   | 11.74                               | 13.83         | YES                  |
| <b>Collection Size</b>                          |                   | 89,000                              | 103,875       | YES                  |
| <b>Public Computers/Internet Access Devices</b> |                   | 10                                  | 20            | YES                  |
| <b>Wireless Internet Access</b>                 |                   | Yes                                 | Yes           | YES                  |

|   |                 |   |               |                      |
|---|-----------------|---|---------------|----------------------|
| <b>Library</b>                                  | <b>Pewaukee</b> | <b>Population</b>   | 24,152        |                      |
|   |                 | <b>Actual Material Expenditures</b>                       | \$117,282     |                      |
|   |                 | <b>Minimum Materials Expenditures (If does not pass.)</b> | \$130,759     |                      |
| <b>Category</b>                                 |                 | <b>Minimum To Exempt</b>                                  | <b>Actual</b> | <b>Pass (Yes/No)</b> |
| <b>\$ Materials/Capita</b>                      |                 | \$5.41  | \$4.86        | NO                   |
| <b>Hours Open</b>                               |                 | 57  | 53            | NO                   |
| <b>FTE</b>                                      |                 | 13.24   | 13.63         | YES                  |
| <b>Collection Size</b>                          |                 | 101,000   | 101,817       | YES                  |
| <b>Public Computers/Internet Access Devices</b> |                 | 13  | 19            | YES                  |
| <b>Wireless Internet Access</b>                 |                 | Yes   | Yes           | YES                  |

|   |               |                                     |               |                      |
|---|---------------|-------------------------------------|---------------|----------------------|
| <b>Library</b>                                  | <b>Sussex</b> | <b>Population</b>                   | 11,487        |                      |
|   |               | <b>Actual Material Expenditures</b> | \$118,443     |                      |
| <b>Category</b>                                 |               | <b>Minimum To Exempt</b>            | <b>Actual</b> | <b>Pass (Yes/No)</b> |
| <b>\$ Materials/Capita</b>                      |               | \$5.87                              | \$10.31       | YES                  |
| <b>Hours Open</b>                               |               | 55                                  | 51            | NO                   |
| <b>FTE</b>                                      |               | 10.20                               | 14.52         | YES                  |
| <b>Collection Size</b>                          |               | 75,000                              | 95,150        | YES                  |
| <b>Public Computers/Internet Access Devices</b> |               | 7                                   | 7             | YES                  |
| <b>Wireless Internet Access</b>                 |               | Yes                                 | Yes           | YES                  |

|   |                 |                                     |               |                      |
|---|-----------------|-------------------------------------|---------------|----------------------|
| <b>Library</b>                                  | <b>Waukesha</b> | <b>Population</b>                   | 71,158        |                      |
|   |                 | <b>Actual Material Expenditures</b> | \$449,581     |                      |
| <b>Category</b>                                 |                 | <b>Minimum To Exempt</b>            | <b>Actual</b> | <b>Pass (Yes/No)</b> |
| <b>\$ Materials/Capita</b>                      |                 | \$5.14                              | \$6.32        | YES                  |
| <b>Hours Open</b>                               |                 | 60                                  | 62            | YES                  |
| <b>FTE</b>                                      |                 | 32.24                               | 45.98         | YES                  |
| <b>Collection Size</b>                          |                 | 164,000                             | 285,626       | YES                  |
| <b>Public Computers/Internet Access Devices</b> |                 | 37                                  | 86            | YES                  |
| <b>Wireless Internet Access</b>                 |                 | Yes                                 | Yes           | YES                  |

## Appendix D

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

|                 | Music on CD | Internet Access | Wi-Fi Access | Outdoor Wi-Fi | e-books |
|-----------------|-------------|-----------------|--------------|---------------|---------|
| Big Bend        | X           | X               | X            |               | X       |
| Brookfield      | X           | X               | X            |               | X       |
| Butler          | X           | X               | X            |               | X       |
| Delafield       | X           | X               | X            | X             | X       |
| Eagle           | X           | X               | X            |               | X       |
| Elm Grove       | X           | X               | X            | X             | X       |
| Hartland        | X           | X               | X            |               | X       |
| Menomonee Falls | X           | X               | X            | X             | X       |
| Mukwonago       | X           | X               | X            | X             | X       |
| Muskego         | X           | X               | X            | X             | X       |
| New Berlin      | X           | X               | X            |               | X       |
| North Lake      | X           | X               | X            |               | X       |
| Oconomowoc      | X           | X               | X            |               | X       |
| Pewaukee        | X           | X               | X            | X             | X       |
| Sussex          | X           | X               | X            | X             | X       |
| Waukesha        | X           | X               | X            | X             | X       |

**Materials and Services Provided by Waukesha County Libraries**

|                 | e-audiobooks | Streaming Video | Digital Magazines | Library of Things | Experience passes |
|-----------------|--------------|-----------------|-------------------|-------------------|-------------------|
| Big Bend        | x            |                 | x                 |                   |                   |
| Brookfield      | x            |                 | x                 |                   |                   |
| Butler          | x            |                 | x                 |                   |                   |
| Delafield       | x            |                 | x                 | x                 | x                 |
| Eagle           | x            |                 | x                 | X                 |                   |
| Elm Grove       | x            |                 | x                 | x                 |                   |
| Hartland        | x            |                 | x                 | x                 |                   |
| Menomonee Falls | x            | x               | x                 | x                 | x                 |
| Mukwonago       | x            |                 | x                 |                   |                   |
| Muskego         | x            | x               | x                 | x                 | x                 |
| New Berlin      | x            | x               | x                 | x                 | x                 |
| North Lake      | x            |                 | x                 |                   |                   |
| Oconomowoc      | x            | x               | x                 | x                 | x                 |
| Pewaukee        | x            |                 | x                 |                   | x                 |
| Sussex          | x            | x               | x                 |                   |                   |
| Waukesha        | x            | x               | x                 |                   | x                 |

|                 | Online Databases | Gale Courses | Technology Assistance | Devices for Check out | Public Copier (B&W) |
|-----------------|------------------|--------------|-----------------------|-----------------------|---------------------|
| Big Bend        | x                | x            | x                     |                       | x                   |
| Brookfield      | x                | x            | x                     |                       | x                   |
| Butler          | x                | x            | x                     |                       | x                   |
| Delafield       | x                | x            | x                     | x                     | x                   |
| Eagle           | x                | x            | x                     | x                     | x                   |
| Elm Grove       | x                | x            | x                     |                       | x                   |
| Hartland        | x                | x            | x                     | x                     | x                   |
| Menomonee Falls | x                | x            | x                     |                       | x                   |
| Mukwonago       | x                | x            | x                     | x                     | x                   |
| Muskego         | x                | x            | x                     | x                     | x                   |
| New Berlin      | x                | x            | x                     | x                     | x                   |
| North Lake      | x                | x            | x                     | x                     | x                   |
| Oconomowoc      | x                | x            | x                     | x                     | x                   |
| Pewaukee        | x                | x            | x                     |                       | x                   |
| Sussex          | x                | x            | x                     |                       | x                   |
| Waukesha        | x                | x            | x                     | x                     | x                   |

**Materials and Services Provided by Waukesha County Libraries**

|                        | <b>Public Copier (Color)</b> | <b>Public Computer Printing (B&amp;W)</b> | <b>Public Computer Printing (Color)</b> | <b>Wireless Printing</b> | <b>Faxing Service</b> |
|------------------------|------------------------------|---|---|--------------------------|-----------------------|
| <b>Big Bend</b>        | X                            | X   | X                                       |                          | X                     |
| <b>Brookfield</b>      |                              | X   |   | X                        |                       |
| <b>Butler</b>          | X                            | X   | X                                       |                          |                       |
| <b>Delafield</b>       | X                            | X   | X                                       |                          |                       |
| <b>Eagle</b>           | X                            | X   | X                                       | X                        | X                     |
| <b>Elm Grove</b>       | X                            | X   | X                                       |                          | X                     |
| <b>Hartland</b>        | X                            | X   | X                                       | X                        | X                     |
| <b>Menomonee Falls</b> | X                            | X   | X                                       | X                        | X                     |
| <b>Mukwonago</b>       | X                            | X   | X                                       | X                        | X                     |
| <b>Muskego</b>         | X                            | X   | X                                       | X                        | X                     |
| <b>New Berlin</b>      | X                            | X   | X                                       |                          |                       |
| <b>North Lake</b>      | X                            | X   | X                                       |                          | X                     |
| <b>Oconomowoc</b>      | X                            | X   | X                                       | X                        |                       |
| <b>Pewaukee</b>        |                              | X   |   | X                        |                       |
| <b>Sussex</b>          | X                            | X   | X                                       | X                        | X                     |
| <b>Waukesha</b>        | X                            | X   | X                                       | X                        | X                     |

|                        | <b>Public Scanner</b> | <b>Microfilm Reader</b> | <b>Local History Resources</b> | <b>Curbside Service</b> | <b>Outreach Services</b> |
|------------------------|-----------------------|-------------------------|--------------------------------|-------------------------|--------------------------|
| <b>Big Bend</b>        |                       |                         | X                              | X                       | X                        |
| <b>Brookfield</b>      | X                     | X                       | X                              |                         | X                        |
| <b>Butler</b>          | X                     |                         | X                              |                         | X                        |
| <b>Delafield</b>       | X                     |                         | X                              | X                       | X                        |
| <b>Eagle</b>           | X                     |                         | X                              | X                       | X                        |
| <b>Elm Grove</b>       | X                     | X                       | X                              |                         | X                        |
| <b>Hartland</b>        | X                     | X                       | X                              |                         | X                        |
| <b>Menomonee Falls</b> | X                     | X                       | X                              | X                       | X                        |
| <b>Mukwonago</b>       | X                     | X                       | X                              | X                       | X                        |
| <b>Muskego</b>         | X                     | X                       | X                              | X                       | X                        |
| <b>New Berlin</b>      | X                     | X                       | X                              | X                       | X                        |
| <b>North Lake</b>      |                       |                         | X                              |                         | X                        |
| <b>Oconomowoc</b>      | X                     | X                       | X                              | X                       | X                        |
| <b>Pewaukee</b>        |                       |                         | X                              | X                       | X                        |
| <b>Sussex</b>          | X                     |                         | X                              | X                       | X                        |
| <b>Waukesha</b>        | X                     | X                       | X                              | X                       | X                        |

**Materials and Services Provided by Waukesha County Libraries**

|                 | Programs for adults | Programs for children | Summer Library Program | Programs for teens | Online programs |
|-----------------|---------------------|-----------------------|------------------------|--------------------|-----------------|
| Big Bend        | X                   | x                     | x                      | x                  |                 |
| Brookfield      | x                   | x                     | x                      | x                  |                 |
| Butler          | x                   | x                     | x                      | x                  |                 |
| Delafield       | x                   | x                     | x                      | x                  | x               |
| Eagle           |                     | x                     | x                      | x                  |                 |
| Elm Grove       | x                   | x                     | x                      | x                  |                 |
| Hartland        |                     | x                     | x                      | x                  |                 |
| Menomonee Falls | x                   | x                     | x                      | x                  | x               |
| Mukwonago       |                     | x                     | x                      | x                  |                 |
| Muskego         | x                   | x                     | x                      | x                  | x               |
| New Berlin      | x                   | x                     | x                      | x                  | x               |
| North Lake      | x                   | x                     | x                      | x                  |                 |
| Oconomowoc      | x                   | x                     | x                      | x                  | x               |
| Pewaukee        | x                   | x                     | x                      | x                  |                 |
| Sussex          | x                   | x                     | x                      | x                  | x               |
| Waukesha        | x                   | x                     | x                      | x                  | x               |

|                 | Interlibrary Loan Service | Meeting Room(s) | Art Gallery or Wall | Tables & Seating | Teen Area | Exam proctoring |
|-----------------|---------------------------|-----------------|---------------------|------------------|-----------|-----------------|
| Big Bend        | X                         | x               |                     | x                |           | x               |
| Brookfield      | x                         | x               | x                   | x                | x         | x               |
| Butler          | x                         | x               |                     | x                | x         | x               |
| Delafield       | x                         | x               | x                   | x                | x         | x               |
| Eagle           |                           | x               |                     | x                | x         | x               |
| Elm Grove       | x                         | x               |                     | x                | x         | x               |
| Hartland        | x                         | x               |                     | x                | x         | x               |
| Menomonee Falls | x                         | x               | x                   | x                | x         | x               |
| Mukwonago       | x                         | x               |                     | x                | x         | x               |
| Muskego         | x                         | x               |                     | x                | x         | x               |
| New Berlin      | x                         | x               | x                   | x                | x         |                 |
| North Lake      | x                         | x               |                     | x                | x         | x               |
| Oconomowoc      | x                         | x               | x                   | x                | x         | x               |
| Pewaukee        | x                         | x               |                     | x                | x         | x               |
| Sussex          | x                         | x               |                     | x                | x         | x               |
| Waukesha        | x                         | x               | x                   | x                | x         | x               |

**Materials and Services Provided by Waukesha County Libraries**

|                 | Reference Services | Readers Advisory | Income Tax Forms | Tax Preparation Assistance | Low Vision Reader |
|-----------------|--------------------|------------------|------------------|----------------------------|-------------------|
| Big Bend        | x                  | x                | x                |                            | x                 |
| Brookfield      | x                  | x                | x                | x                          | x                 |
| Butler          | x                  | x                | x                |                            | x                 |
| Delafield       | x                  | x                | x (end 2022)     |                            | x                 |
| Eagle           | x                  | x                | x                |                            | x                 |
| Elm Grove       | x                  | x                | x                |                            | x                 |
| Hartland        | x                  | x                | x                |                            | x                 |
| Menomonee Falls | x                  | x                | x                | x                          | x                 |
| Mukwonago       | x                  | x                | x                | x                          | x                 |
| Muskego         | x                  | x                | x                | x                          | x                 |
| New Berlin      | x                  | x                | x                |                            | x                 |
| North Lake      | x                  | x                | x                |                            | x                 |
| Oconomowoc      | x                  | x                | x                |                            | x                 |
| Pewaukee        | x                  | x                | x                |                            |                   |
| Sussex          | x                  | x                | x                |                            | x                 |
| Waukesha        | x                  | x                | x                | x                          | x                 |

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

**Materials and Services Provided by Waukesha County Libraries**

|                        | <b>Makerspace Lab</b> | <b>3D Printer</b> | <b>Self-Checkout</b> | <b>Coffee</b> | <b>Home Delivery</b> | <b>Wi-Fi Hotspots for Checkout</b> |
|------------------------|-----------------------|-------------------|----------------------|---------------|----------------------|------------------------------------|
| <b>Big Bend</b>        |                       |                   |                      |               |                      |                                    |
| <b>Brookfield</b>      |                       |                   | <b>x</b>             |               | <b>x</b>             | <b>x</b>                           |
| <b>Butler</b>          |                       |                   |                      |               |                      |                                    |
| <b>Delafield</b>       |                       |                   | <b>x</b>             |               | <b>x</b>             | <b>x</b>                           |
| <b>Eagle</b>           |                       |                   |                      | <b>x</b>      | <b>x</b>             | <b>x</b>                           |
| <b>Elm Grove</b>       |                       |                   |                      |               | <b>x</b>             |                                    |
| <b>Hartland</b>        |                       |                   | <b>x</b>             | <b>x</b>      | <b>x</b>             | <b>x</b>                           |
| <b>Menomonee Falls</b> | <b>x</b>              | <b>x</b>          | <b>x</b>             |               | <b>x</b>             | <b>x</b>                           |
| <b>Mukwonago</b>       | <b>x</b>              | <b>x</b>          | <b>x</b>             | <b>x</b>      | <b>x</b>             | <b>x</b>                           |
| <b>Muskego</b>         |                       | <b>x</b>          | <b>x</b>             |               |                      | <b>x</b>                           |
| <b>New Berlin</b>      | <b>x</b>              | <b>x</b>          | <b>x</b>             |               | <b>x</b>             | <b>x</b>                           |
| <b>North Lake</b>      | <b>x</b>              |                   | <b>x</b>             |               |                      | <b>x</b>                           |
| <b>Oconomowoc</b>      |                       |                   | <b>Coming '22</b>    |               | <b>x</b>             | <b>x</b>                           |
| <b>Pewaukee</b>        |                       |                   | <b>x</b>             |               |                      |                                    |
| <b>Sussex</b>          |                       |                   | <b>x</b>             | <b>x</b>      | <b>x</b>             | <b>x</b>                           |
| <b>Waukesha</b>        | <b>x</b>              | <b>x</b>          | <b>x</b>             |               | <b>x</b>             | <b>x</b>                           |

|                        | <b>Outdoor Space</b> | <b>Newsletter</b> | <b>Social Media Presence</b> | <b>Notary Services</b> | <b>Group Technology Training</b> |
|------------------------|----------------------|-------------------|------------------------------|------------------------|----------------------------------|
| <b>Big Bend</b>        |                      |                   | <b>x</b>                     |                        |                                  |
| <b>Brookfield</b>      | <b>x</b>             | <b>x</b>          | <b>x</b>                     |                        | <b>x</b>                         |
| <b>Butler</b>          |                      |                   | <b>x</b>                     |                        |                                  |
| <b>Delafield</b>       | <b>x</b>             | <b>x</b>          | <b>x</b>                     |                        | <b>x</b>                         |
| <b>Eagle</b>           | <b>x</b>             |                   | <b>x</b>                     |                        |                                  |
| <b>Elm Grove</b>       |                      | <b>x</b>          | <b>x</b>                     |                        |                                  |
| <b>Hartland</b>        | <b>x</b>             | <b>x</b>          | <b>x</b>                     |                        |                                  |
| <b>Menomonee Falls</b> | <b>x</b>             | <b>x</b>          | <b>x</b>                     |                        | <b>x</b>                         |
| <b>Mukwonago</b>       | <b>x</b>             | <b>x</b>          | <b>x</b>                     | <b>x</b>               |                                  |
| <b>Muskego</b>         | <b>x</b>             | <b>x</b>          | <b>x</b>                     |                        |                                  |
| <b>New Berlin</b>      | <b>x</b>             | <b>x</b>          | <b>x</b>                     |                        | <b>x</b>                         |
| <b>North Lake</b>      |                      | <b>x</b>          | <b>x</b>                     |                        | <b>x</b>                         |
| <b>Oconomowoc</b>      |                      | <b>x</b>          | <b>x</b>                     |                        | <b>x</b>                         |
| <b>Pewaukee</b>        | <b>x</b>             | <b>x</b>          | <b>x</b>                     |                        |                                  |
| <b>Sussex</b>          |                      | <b>x</b>          | <b>x</b>                     |                        |                                  |
| <b>Waukesha</b>        |                      | <b>x</b>          | <b>x</b>                     |                        |                                  |

**Materials and Services Provided by Waukesha County Libraries**

|                        | <b>Handicapped Accessible Building</b> | <b>Designated Warming/Cooling Shelter</b> | <b>Digitized local history</b> | <b>STEM Lab</b> | <b>Early Literacy Play Areas</b> |
|------------------------|--|---|--------------------------------|-----------------|----------------------------------|
| <b>Big Bend</b>        | x                                      |   |                                |                 |                                  |
| <b>Brookfield</b>      | x                                      |   | x                              |                 | x                                |
| <b>Butler</b>          | x                                      |   |                                |                 | x                                |
| <b>Delafield</b>       | x                                      | x   |                                |                 | x                                |
| <b>Eagle</b>           | x                                      | x   |                                |                 |                                  |
| <b>Elm Grove</b>       | x                                      |   |                                |                 | x                                |
| <b>Hartland</b>        | x                                      |   | x                              |                 | x                                |
| <b>Menomonee Falls</b> | x                                      | x   | x                              | x               | x                                |
| <b>Mukwonago</b>       | x                                      | x   |                                |                 | x                                |
| <b>Muskego</b>         | x                                      | x   |                                |                 | x                                |
| <b>New Berlin</b>      | x                                      | x   |                                | x               | x                                |
| <b>North Lake</b>      | x                                      |   | x                              |                 | x                                |
| <b>Oconomowoc</b>      | x                                      | x   |                                |                 | x                                |
| <b>Pewaukee</b>        | x                                      | x   |                                |                 | x                                |
| <b>Sussex</b>          | x                                      | x   | x                              | x               | x                                |
| <b>Waukesha</b>        | x                                      | x   | x                              | x               | x                                |

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

## Appendix E

### **Glossary of Terms: Library Materials and Services**

#### **Art Gallery**

Public exhibition space to display artwork, often created and/or provided by local artists.

#### **Book Club Kits**

Curated collections of books that patrons can check out in order to host their own book clubs. Multiple copies of each book are available in each kit, often with discussion questions.

#### **Charging Stations**

Freestanding powering devices that can be used to charge phones, laptops, and mobile devices.

#### **Curbside Service**

Library patrons may place a hold on library materials to pick up at a library. When the materials are ready, the patron is able to arrange to have them brought out to their vehicle or placed outside for easy pickup.

#### **Devices for Checkout**

Technical devices available for checkout. Examples include laptops, GPS devices, tablets, and e-readers.

#### **Experience/Explore Passes**

Offer free admission for individuals or groups to local and regional attractions such as museums, the zoo, and the Mitchel Park Domes.

#### **Group Tech Training**

Formal librarian-led classes providing information and hands-on practice to improve patron skill level with technical devices such as tablets and computers; computer software such as Microsoft Word; and Internet use, such as social media and online searching.

#### **Hearing Loop**

An Assistive Listening System that transfers sound- from a microphone or TV- directly to a hearing device or cochlear implant, via a tiny telecoil (t-coil) receiver, allowing those with hearing issues to hear and participate in library programs and interactions with staff and presenters. Hearing loops are available in library meeting rooms and/or customer help desks at designated libraries.

### **Home Delivery**

Delivery of library materials to individual homes, as well as senior living facilities and nursing homes.

### **Makerspace/3D Printer**

Creative gathering space with tools and equipment so patrons can engage in creative projects. Makerspaces may include 3D printers, sewing machines, video recording equipment, scrapbooking materials, robotics, and coding software.

### **Library of Things**

A collection of objects available for checkout. Possible items include tools, recreational equipment, toys, games, science kits, or musical instruments.

### **Online Databases**

Online access to collections of information on a variety of topics. Examples include AncestryLibrary, Consumer Reports, JobNow, Morningstar Investment Research Center, and Rosetta Stone. Accessible to library patrons within and outside the library.

### **Online Training Courses**

Over 300 instructor-led, online classes through the Gale Courses product. Courses offer learning opportunities for professional development, technology skills, and personal enrichment. Accessible to library patrons within and outside the library.

### **Outdoor Space**

Accessible outdoor areas, such as gardens, courtyards, and/or outdoor seating, for patron use and library programming.

### **Outreach Services**

Engaging with the community through library programming, collections, and services outside of the library. Examples include attending community events such as farmer's markets and festivals; presenting at meetings of local organizations; and bringing programming to schools and senior living facilities.

### **STEM lab**

A designated space for children's activities designed to promote Science, Technology, Engineering, and Math (STEM) through access to STEM-based tools and activities.

**Warming/cooling shelter**

Official, county-designated safe spaces where the public can stay to warm up or cool down during inclement weather. Waukesha County Emergency Management directs and refers people to these sites during weather emergencies.

**Wi-Fi Hotspots**

Portable wireless access points providing network and/or Internet access to mobile devices. Available for checkout to provide patrons with wireless access if it is otherwise unavailable.

DRAFT



# 2021 IN REVIEW



PAULINE HAASS  
— PUBLIC LIBRARY —



**84,119**  
visits to the library

**221**  
programs  
offered



**12,275** program  
attendees



**14k**  
reference questions  
answered by librarians

**105**



**667**  
study room  
appointments



**3,109**  
public computer sessions



**10,182**  
wifi sessions



**8,762**  
items added to the collection



**287,551**  
physical items checked out

**36,812**



digital  
items  
checked  
out



**900**  
hold requests  
filled each week

## Highlights from 2021

- Established Home Delivery Service
- Introduced CAFE Library Mobile App
- Converted library collection to RFID for increased convenience and security
- Launched outdoor library programs and added 24/7 outdoor WiFi
- Continued the successes of 2020, including curbside pickup, grab-and-go programming, book bundles, and improvements to our digital collection, like the introduction of Hoopla!



## Circ By Material Type: 2016 to 2021

| <b>Material Type - MEDIA</b> | <b>2016</b>   | <b>2017</b>   | <b>2018</b>   | <b>2019</b>   | <b>2020</b>   | <b>2021</b>   |
|------------------------------|---------------|---------------|---------------|---------------|---------------|---------------|
| BluRay                       | 765           | 1081          | 1006          | 985           | 922           | 596           |
| Browsing AV                  | 10431         | 11787         | 11396         | 9385          | 5186          | 3467          |
| CD                           | 9105          | 7297          | 6653          | 5639          | 5011          | 4073          |
| CD Book                      | 7142          | 7085          | 7208          | 7073          | 4325          | 4165          |
| Children's CD                | 1664          | 1430          | 1432          | 1315          | 937           | 679           |
| Children's CDBook            | 1734          | 1681          | 1558          | 1675          | 1737          | 1686          |
| Children's DVD               | 23068         | 23222         | 19815         | 19398         | 12138         | 11455         |
| DVD                          | 40359         | 38444         | 34983         | 34873         | 24691         | 22921         |
| Non-Fiction DVD              | 3038          | 2592          | 2275          | 2392          | 1940          | 1515          |
| <b>TOTALS</b>                | <b>97,306</b> | <b>94,619</b> | <b>86,326</b> | <b>82,735</b> | <b>56,887</b> | <b>50,557</b> |

| <b>Material Type - PRINT</b> | <b>2016</b>    | <b>2017</b>    | <b>2018</b>    | <b>2019</b>    | <b>2020</b>    | <b>2021</b>    |
|------------------------------|----------------|----------------|----------------|----------------|----------------|----------------|
| Book                         | 53605          | 54863          | 55790          | 61532          | 51496          | 60165          |
| Browsing                     | 1233           | 1668           | 1887           | 2179           | 2162           | 2819           |
| Children's Board Book        | 6116           | 5753           | 6300           | 6974           | 6239           | 9152           |
| Children's Book              | 109457         | 109101         | 118796         | 126673         | 106547         | 132583         |
| New Book                     | 15204          | 15299          | 15508          | 15252          | 10882          | 12600          |
| New Fiction                  | 657            | 612            | 740            | 691            | 647            | 775            |
| Paperback                    | 6159           | 5757           | 4511           | 4086           | 3186           | 4015           |
| <b>TOTALS</b>                | <b>192,431</b> | <b>193,053</b> | <b>203,532</b> | <b>217,387</b> | <b>181,159</b> | <b>222,109</b> |



# Children's Books

## Comparison of libraries by size (service population)

| Library                | Service Pop. 2020 |
|------------------------|-------------------|
| New Berlin             | 41,516            |
| Menomonee Falls        | 39,828            |
| Oconomowoc             | 27,986            |
| Muskego                | 26,615            |
| Pewaukee               | 26,269            |
| Pauline Haass (Sussex) | 25,384            |
| Mukwonago              | 24,020            |

## Children's books checked out in 2021

| Month             | Men. Falls     | Mukwonago      | Muskego       | New Berlin     | Oconomowoc     | Pauline Haass  | Pewaukee       |
|-------------------|----------------|----------------|---------------|----------------|----------------|----------------|----------------|
| January           | 6,395          | 8,099          | 5,983         | 12,269         | 8,228          | 8,952          | 8,419          |
| February          | 8,902          | 8,255          | 6,260         | 12,332         | 8,601          | 11,388         | 8,803          |
| March             | 11,795         | 9,272          | 7,090         | 13,767         | 9,875          | 13,281         | 10,696         |
| April             | 11,720         | 8,061          | 6,608         | 11,931         | 9,404          | 12,177         | 9,053          |
| May               | 11,453         | 7,660          | 6,003         | 10,937         | 9,795          | 10,809         | 8,934          |
| June              | 16,913         | 11,054         | 11,629        | 15,701         | 14,390         | 17,729         | 12,974         |
| July              | 18,078         | 12,207         | 10,877        | 14,969         | 13,883         | 17,075         | 13,516         |
| August            | 15,154         | 11,337         | 9,205         | 14,472         | 11,722         | 14,299         | 11,748         |
| September         | 12,458         | 8,619          | 6,153         | 11,312         | 10,157         | 12,425         | 8,594          |
| October           | 11,912         | 9,794          | 7,229         | 12,200         | 10,577         | 12,887         | 8,412          |
| November          | 11,310         | 9,598          | 7,267         | 11,149         | 9,953          | 11,952         | 7,966          |
| December          | 10,449         | 6,828          | 5,302         | 9,206          | 8,557          | 10,823         | 3,514          |
| <b>2021 Total</b> | <b>146,539</b> | <b>110,784</b> | <b>89,606</b> | <b>150,245</b> | <b>125,142</b> | <b>153,797</b> | <b>112,629</b> |

## Children's circulation vs. service population

