

Waupaca County Library Service Plan: 2025-2029

Recommended for Adoption to the
Waupaca County Board of Supervisors
By Waupaca County Library Services Planning Committee
October 17, 2024
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Introduction

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

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

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

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

Review of the 2020-2024 County Library Service Plan

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

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

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

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

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

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

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

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

History of Funding

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

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

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

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

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

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

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

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

Rationale for the 2025-2029 Plan

The Planning Committee has concluded that the current system of paying for library services (i.e., residents of communities with libraries support them through their local property taxes, and all other county residents pay for library service as part of their county taxes) has been fair and equitable for all parties.

Equitable funding for library service is a priority for the OWLS Board, for the libraries providing the service, and for their municipalities. Consequently, the Committee recommends that the county funding level be maintained at 100% of the county formula for the duration of this plan. Because library reimbursements are exempt from the county's levy limits, Waupaca County is in a position to provide full funding to municipal libraries without any impact on other county programs.

However, the Committee fully understands the economic difficulties facing all levels of government and that the recommended funding methodology is only possible because of the levy exemption. It is understood by all parties that should library payments no longer be exempt from county levy limits the recommended funding methodology would need to be revisited.

Outagamie County has had a longstanding practice of reimbursing the Clintonville Public Library and the New London Public Library, both located in Waupaca County, using the funding

methodology defined in the Outagamie County Library Service Plan. The Waupaca county planning committee has added item 4 in the funding methodology section to extend the same privilege to any OWLS member libraries located Outagamie County that meet the same minimum criteria. As of the writing of this plan, no Outagamie County libraries meet those criteria.

County libraries report that they are unable to meet patron demand for digital materials for several reasons. Circulation statistics and materials requests demonstrate that demand is increasing for materials in digital formats, and digital formats usually cost libraries more than physical formats. For many years, libraries have been stretching collection budgets to their limits to buy more formats of the same titles, and smaller, more rural libraries in particular have been unable to invest in digital collections.

Digital borrowing has less “friction” than borrowing physical items. The patron does not have to make a trip to the library or even wait until it is open. In this way, digital collections make library service more accessible to county residents who live farther from libraries, and the committee believes that additional county support for electronic collections is justified. Waupaca County is encouraged to designate an amount of county funding each year, in addition to the formula reimbursement, that libraries may use for purchases in digital collections that are accessible to all county residents.

As in the past, it is recommended that the county board regularly appoint five members to the OWLS Board. It is also recommended that OWLS continue to be the agent to coordinate the annual budget process.

Recommended Funding Methodology

The committee recommends the following funding methodology, which is based on a modification of the statutory funding formula, and which assumes that the amount the county taxes for library payments continues to be exempt from the county’s levy limits. See Appendix C for definitions and a sample calculation.

1. Determine Each Library’s Cost of Service
 - a. A library’s total operating expenditure in a given year, excluding capital expenditures and rent, less net building lease costs, less expenditures from federal sources, and less operating revenue from contracts, fines, fees, gifts, grants, or donations, is divided by total circulation during the same year to determine the library’s cost per loan.

Electronic circulation will be included as part of the total circulation provided by a library if that library includes an amount in its annual operating budget to purchase or lease items in electronic format, and if OWLS is able to obtain data from the content vendor that identifies the user’s municipality.

- b. A library's cost per loan is multiplied by its number of loans to county residents living in jurisdictions that do not maintain libraries to determine the library's cost of service provided to the county.
2. This plan recommends funding libraries at 100% of the formula.
3. Determine Each Library's Payment
 - a. Each library's payment will be determined by multiplying its cost of county service by the funding level for the particular budget year.
 - b. Each library's payment under the county formula will be compared to the statutory minimum funding level for that library. If a library's funding under the county's formula is less than the required state minimum, its appropriation will be increased to the required minimum amount.
4. OWLS member libraries that are located in Outagamie County may request funding according to the funding methodology described in numbers 1-3 above when one or more of the following criteria is met.
 - a. The municipality has territory in both counties.
 - b. The library's circulation to Waupaca County residents who reside outside of communities that maintain their own libraries exceeds 5% of the library's total circulation.
5. Calculate county support for electronic collections
 - a. Annually, OWLS will include in the county budget request an amount equal to 1% of the total funding formula request for home county libraries.
 - b. OWLS will act as the fiscal agent for this pool of funding for electronic collections.
 - c. A committee made up of library representatives will direct OWLS staff to purchase e-books and e-audiobooks in the shared digital collection.
6. Annually, OWLS will coordinate the budget request process and will submit a budget request equaling the total of the payment amounts for all county libraries, qualifying Outagamie County libraries, and electronic collections.
7. The OWLS Board will monitor the effectiveness of this funding methodology and recommend any changes to Waupaca County. In 2029, this methodology will be evaluated by the next County Library Planning Committee.

Goals and Objectives

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

Objectives:

1. Waupaca County shall regularly meet all statutory requirements in order to continue its membership in OWLS. (2025-2029)
2. Waupaca County shall regularly appoint five members to the OWLS Board in accordance with this plan and with Section 43.19, Wisconsin Statutes. (2025-2029)
3. Waupaca County shall designate the OWLS Board to coordinate the implementation of countywide library services. (2025-2029)
4. Waupaca County shall encourage all municipal libraries in the county to continue their memberships in OWLS. (2025-2029)
5. OWLS shall continue working with neighboring systems and counties to resolve intersystem service inequities so that Waupaca County libraries are compensated adequately for providing services to residents of other systems. (2025-2029)

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

Objectives:

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

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

Objectives:

1. The OWLS Board shall annually review this plan and shall forward to the County Board any recommended revisions. (2025-2029)
2. The County Board shall appoint a library planning committee to revise this plan or develop a new county library service plan whenever warranted. (2025-2029)

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

Appendix A

Waupaca County Planning Committee Members – Appointed by the Waupaca County Board of Supervisors in May 2024

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Appendix B

Guiding Principles

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

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

Appendix C

Definitions and Sample Calculation

Circulation A circulation transaction is the act of loaning materials at a library in all physical formats for use outside the library. This activity includes checking out materials to users, either manually or through a self-checkout system, and renewing materials, each of which is reported as a circulation transaction. Include items circulated from all library units (e.g., main library, branches, bookmobiles, and book-by-mail programs) administered by the library board.

Electronic Circulation An electronic circulation is defined as an individual electronic file, corresponding to a commercial work, cataloged as a distinct resource, requiring user authentication for access, and made available for a limited, defined time period on an electronic device. As such “uses” or “hits” of electronic databases or similar files will not be considered electronic circulation.

For the purposes of calculating library reimbursements, OWLS uses data found in the *Wisconsin Public Library Annual Report* whenever possible. Library boards are required to file reports with the Wisconsin Department of Public Instruction’s (DPI’s) Division for Libraries and Technology (DLT) and the libraries’ municipal governing body within 60 days of the conclusion of the fiscal year, under Wis. Stat. 43.58 (6) (a). Data not available in the report is collected from library directors or reports generated by OWLS.

Sample Library Reimbursement Calculation			
Formula Variables	Data Source	Example	Notes
Total Operating Expenditures	Library Annual Report, Section VI. Field 6.	\$ 400,000	
Exclude Capital Expenditures	Library Annual Report, Section VII.		Capital expenditures and rent paid to the municipality or county are not included in operating expenditures in library annual reports, so do not need to be deducted here.
Less Rent	Library Annual Report, Section VII.		
Less Net Building Lease Costs	Reported to OWLS by library director	\$ -	Most libraries do not lease their buildings, and this data is not explicitly called out in the library annual report.
Less Federal Expenditures	Library Annual Report, Section VI. Field 7.	\$ (200)	
Less Contract Income	Library Annual Report, Section V. Field 5.	\$ -	Libraries rarely have contract income
Less All Other Operating Income	Library Annual Report, Section V., Field 7.	\$ (20,000)	Includes operating revenue from fines, fees, gifts, grants, and donations.
Operating Expenditures per County Formula		\$ 379,800	
Circulation	Library Annual Report, Section III. Field 1a.	60,000	
Electronic Circulation	Library Annual Report, Section III. Field TBD	10,000	This field will be moved to section III for the 2024 library annual report. The instructions with the final field number have not been published as of the writing of this plan.
Total Circulation per County Formula		70,000	
Cost per Loan		\$ 5.43	Operating expenditures divided by total circulation
Circulation to County Residents	Library Annual report, Section XI. Field 2b.	20,000	
Electronic Circ to County Res.	Reports generated by OWLS	4,000	
Total Circulation to County Residents		24,000	County residents living in jurisdictions that do not maintain libraries.
Cost of Service Provided to the County by the Library		\$ 130,320	Cost per loan multiplied by total circulation to county residents living in jurisdictions that do not maintain libraries
Funding Percentage	Determined during county budget process	100%	Plan recommends maintaining 100% funding
County Reimbursement to Library for Service Provided to County Residents		\$ 130,320	Cost of service multiplied by funding percentage