

Alice Baker Memorial Library Long Range Plan 2008 to 2010

Fourth Draft May 2007
Alice Baker Memorial Library
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Table of Contents

EXECUTIVE SUMMARY	5
SHORT LIBRARY HISTORY.....	7
DATA FOR WISCONSIN LIBRARIES OF COMPARABLE SIZE.....	7
LIBRARY STRENGTHS AND WEAKNESSES AND SUGGESTIONS.....	9
LIBRARY STRENGTHS.....	9
LIBRARY WEAKNESSES.....	9
OTHER SUGGESTIONS:	10
LIBRARY VALUES.....	11
PUBLIC LIBRARY SERVICE ROLES CHOSEN.....	12
OBJECTIVES	13
COLLECTION.....	13
OPERATIONAL HOURS AND BUILDING ISSUES.....	13
STAFF AND BOARD	14
TECHNOLOGY PLANS	14
PROGRAMMING AND PUBLIC SERVICE	14
BUILDING PLANS.....	16
Building Size.....	16
Impact Fees.....	17
APPENDIX MATERIAL.....	19
APPENDIX 1: PUBLIC LIBRARY ASSOC. RECOMMENDED LIBRARY SERVICE RESPONSES.....	21
APPENDIX 2: STATE BUILDING SURVEY	22
APPENDIX 3: SPACE COMPARISONS STATEWIDE	23
APPENDIX 4: WI PUBLIC LIBRARY STANDARDS COMPARED TO LIBRARY ACTUAL	24
APPENDIX 5: COUNTY LIBRARY STANDARDS	25
APPENDIX 6: STATE STANDARDS AND ALICE BAKER ACTUAL AMOUNTS.	28
APPENDIX 7: HAPLR RATINGS FOR LIBRARY.....	29

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Executive Summary

In Fall 2006 the Alice Baker Memorial Library Board began meeting with Waukesha County Federated Library System Director Tom Hennen and Library Director Alli Chase to develop a long-range plan. The Library Board spent many hours examining many pages of reports on the issues facing the library.

The Board noted that the library has a low service profile at present. It was rated one of the lowest in the county on the HAPLR¹ ratings in 2006. It is a stated goal of the library to improve this level despite the challenges that a growing population will bring.

During the course of discussions it was noted that **Money** magazine's annual survey of best places to live uses four criteria relating to quality of life: commuting time, the number of 4 and 5 star restaurants, doctors available, **the quality of its library.**

The Board:

- reviewed the input and output measures for the library by comparison to other libraries in the state and nation. (See Appendix HAPLR comparisons)
- review of the state library checklist for libraries revealed a number of areas in which the library needs to focus efforts – most of these have been included in the objectives here. The full checklist document is available separately. See Appendix.
- plans to review its entire policy manual and update policies where necessary.
- reviewed calculations on building size based on recommended data from the state Division for Libraries, Technology and Community Learning. See appendix.
- considered and endorsed a report on the use of Impact Fees to assist in funding the library building and collection. See Appendix.

Key Objectives: For other objectives, see the Objectives section beginning on page 10. Key conclusions are:

- The library has outgrown the current library building and suitable alternate quarters should be considered. The building is currently 4,200 square feet while closer to 14,000 would be ideal.
- Decrease crossover borrowing² by innovative marketing, programming and collection development activities.
- Programming is critical to modern library services. The present building cannot accommodate the training in technology, story time for children, coffee shop or scores of other programs and activities envisioned in the planning process.
- State voluntary standards define four levels of standards: basic, moderate, enhanced and excellent. The county standards are set at the basic or minimum level. For the most part, Eagle is close to the basic level. It is recommended that throughout the plan period, the library attempt to stay between the basic and moderate level for all standards.

¹ HAPLR Ratings are the Hennen's American Public Library Ratings, an annual scorecard on U.S. libraries published by Tom Hennen.

² Crossover borrowing is use by Eagle residents at other libraries such as Mukwonago. Eagle Town and Village residents go to other libraries far more frequently than other community residents come to Alice Baker Memorial Library.

- As important as the Internet and electronic data services are, the board and staff remain committed to serving the needs of print users. We will “balance the books and bytes” as we move forward in this new millennium.

Acknowledgments

Library Board

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Library Staff

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Waukesha County Federated Library System

- Thomas J. Hennen Jr. Director

Short Library History

Organized in 1974 with a dedicated group of citizens of the town and village of Eagle, the Alice Baker Library was begun. Starting in one room of the Methodist Church in 1974, moving to a small two-story building in 1984 and to its present location in 1994, the library has grown in part due to community support. With a long-range plan in the near future, consideration will be given to a future renovation of the current building or construction of a new building. The library needs to also plan for the addition of new and developing technologies and prepare for future programs and services. The motto of “*The Little Library With Big Ideas*” will be the library’s theme for the 21st. century.

Data for Wisconsin Libraries of Comparable Size

Comparing the library on a per capita basis to libraries of comparable size, note the following:

- ❑ At 4,160 square feet, the library is below the average size for communities of comparable population size. The average square feet per capita for 65 comparable libraries was 1.8 while Eagle has 0.8 square feet per capita.
- ❑ Staffing levels are low compared to other libraries of comparable population.
- ❑ The library has an operating budget that is only 57% that of its peers but a tax base 34% higher so its effective tax rate of \$0.35 per thousand of equalized value, is only half that of comparable communities.
- ❑ On Wisconsin Public Library Standards the library scores at or below the basic or moderate level on most measures.

State Libraries in the 5,000 to 10,000 population range	Eagle	Other Libraries	Eagle % avg
Number of libraries	1	65	
Tax base per capita	\$66,771	\$49,748	134%
Salaries/capita	\$14.80	\$22.59	66%
Benefits per capita	\$1.57	\$6.62	24%
Materials/capita	\$3.76	\$7.86	48%
Other per capita	\$6.70	\$10.21	66%
Operating per capita	\$26.83	\$47.27	57%
Total staff per 1000	0.6	1.0	59%
Hours open	56	48	96%
Sq feet bldg/capita	0.8	1.8	47%
Tax per \$1,000	\$0.35	\$0.71	50%

Community Profile

Eagle has been predominantly agricultural, with the State Forest being a significant feature, but it is currently going through a period of rapid growth and evolution as the metropolitan community of Milwaukee approaches. Significant portions of the current community are relative newcomers, commuters into the metro area, living in relatively new subdivisions. There is some growth in small businesses and light industry, but much of the commercial activity of residents is elsewhere. The community is divided between two school systems.

The town and village combined have a population of over 5,000, with 37% of that number in the village. Waukesha County has become one of the fastest growing counties in the state and the Eagle area is one of the fastest growing areas of the county.

Library Strengths and Weaknesses and Suggestions

The strengths and weaknesses listed here are based on extensive conversations with the library board and staff over a period of many months.

Library Strengths

Alice Baker Memorial Library is a small library that provides a high level of customer service. The staff is friendly and always willing to help. In spite of being one of the smallest libraries in WCFLS, a great deal of service is provided.

As one board member put it: "I feel that the Alice Baker Memorial Library is a unique library. I would guess (having visited a few libraries in my days) that we are one of the most PR promoting libraries around. We have a cheerful, caring, helpful, congenial, cooperative and willing staff that puts the patron first. We "bend over backwards" – to help patrons, again be it a book, a copy, local info, or technology, a hug or just a cheery hello. With caring staff, we can accommodate the majority of patrons. We are small enough to know many of our patrons personally – yet big enough to help them find anything, again be it a book, a smile, or technology. We are here to please – how much better can a library be?"

Staff and board also list the following strengths:

- Staff: enthusiasm, friendliness, work ethic
- Convenient check out
- Small enough to be easy to use
- Excellent, friendly service in a very nice atmosphere
- Willingness to innovate upon suggestion
- Very good community governments, a good Friends of the Library organization
- Good working relations with Eagle Elementary
- Coffee hour, media center, and a good selection of new holdings
- Dedicated core of volunteers

Library Weaknesses

There is nearly unanimous agreement that the library is overcrowded and that there is not sufficient space for staff to efficiently do their work.

Most board and staff members agree that the support level received from the town and village is low compared to other Waukesha County libraries and not enough to serve the community adequately. The low level of resources and the fact that many residents commute to other areas for their jobs means that there is a high level of use of other area libraries (especially Mukwonago and Waukesha). The low level of resources also means that the library does not attract much traffic from other communities. This situation results in the perennial "crossover borrowing" issue so much discussed by library staff and funding authorities.

Both the board and staff indicated that personnel policies need improvement. Regular evaluations and goal setting are needed. The board needs to do this with the director, and the director needs to do so with the staff.

Keeping current with technology and the need for automated services is a constant challenge for the staff of this library. Training and support for staff engaged in technology is sorely needed.

Other Suggestions:

1. Survey the town and village residents for satisfaction with, interest in, and feedback for, the library.
2. Draw people into the library with expanded programming and innovative marketing.
3. Create a more visible partnership with the school systems; increase involvement with the Mukwonago schools serving Eagle.
4. Appeal to new residents and new users of the library, by means of:
 - Letter, invitation, or promotion to new residents of Eagle
 - More signs and notices in both the Town and the Village
 - Improved signs and labeling inside the library to assist new users
5. Outreach to the eastern and northern parts of the Town, where residents are less likely to travel into the village and library.
6. Increase involvement and partnerships with other community organizations.
7. Expand services in technology, i.e., media center, databases, teen center, Kinko's-type services to the community.
8. Outreach to the Hispanic community with programs and classes.

Library Values

The board considers the following values when setting policies and plans for the library:

- Intellectual growth and freedom
- Promoting staff as a critical resource
- Quality library services and staff
- Technology as a means to an end for better library services, and not an end in itself
- The ongoing need for community education for all age groups

Vision Statement

The library strives to be “the little library with big ideas.”

Mission Statement

The mission of the Alice Baker Memorial Public Library is to:

- provide information in a variety of formats
- be responsive to the public’s needs
- promote reading, literacy and lifelong learning
- and to uphold the public's freedom of access to information.

The library supports its mission by aiming:

- To assemble, preserve and administer in organized collections, books and related educational and recreational material in order to promote, through guidance and stimulation, the communication of ideas, an enlightened citizenship and enriched personal lives.
- To serve the community as a center of reliable information.
- To support educational, civic, and cultural activities of groups.
- To provide opportunities and encouragement for children, young adults, men and women to educate themselves.
- To seek to identify community needs.
- To provide programs of service to meet such needs, and to collaborate with other organizations, agencies, and institutions which can provide programs or services.
- To provide opportunity for enrichment through the use of literature, music, and other art forms.
- To support and endorse the Library Bill of Rights and the interpretation of the Freedom to Read statement.

Public Library Service Roles Chosen

The Public Library Association has recommended that libraries consider focusing their activities by choosing some of the 13 possible “Public Library Service Responses” found in Appendix 1.

The Alice Baker Memorial Public Library chose the following responses.

- **Consumer Information:** helps to satisfy the need for information that impacts the ability of community residents to make informed consumer decisions and to help them become more self-sufficient.
- **Cultural Awareness:** helps satisfy the desire of community residents to gain an understanding of their own cultural heritage and the cultural heritage of others.
- **Government Information:** helps satisfy the need for information about elected officials and governmental agencies that enable people to participate in the democratic process. The emphasis will be on local information.
- **Information Literacy:** helps address the need for skills related to finding, evaluating, and using information effectively.

Objectives

Collection

Build the materials collection to meet at least the basic, if not the moderate level of state standards by 2009. Currently the library is at the basic to moderate level of standards by comparison to library peers statewide. It will be necessary to add materials above the current level to meet standards. (See appendix for details on state standards and county standards).

Annual tasks:

1. Increase book budget to \$ 35,625 annually³ between 2007 and 2010 in order to maintain the collection at the moderate to enhanced state standards level for total collection size.
2. Aim for a total collection size of between 31,000 and 37,500 book volumes throughout the plan period, compared to the current 27,785. This will put the library at the moderate to enhanced state standard level.
3. Aim for an annual book addition rate of between 1,400 and 1,500 volumes.
4. Aim for an annual book-weeding rate of between 1,000 and 1,200 volumes.
5. Plan to maintain the periodical collection at the rate of 99 to 113 subscriptions compared to the current 80.
6. Maintain audio collection at over 950 items compared to current 1,083 items. This is at the moderate state standard level.
7. Maintain video collection at over 1,550 items as compared to current 2,231. This is at the excellent level for state standards.
8. Continue to add new formats as they become available. (E-books, books on CD, etc.)
9. Evaluate the collection development plan annually based on usage in each Dewey Decimal category. Cost is part of current ongoing program.

Operational Hours and Building issues.

Annual tasks:

1. Keep open hours at between 56 and 57 hours per week as compared to the current 56. This would be at the basic level for state standards.
2. Staffing permitting, include added weekend and evening hours in the library service profile by 2009. Estimated cost at about \$40 per additional open hour.
3. Develop a plan for meeting all Americans with Disabilities Act requirements for accessibility in this building.
4. By the end of 2008, determine whether all areas of the present library meet relevant standards for lighting. If not, develop a plan to remedy the situation.

³ 2006 Materials budget is \$ 32,101. But standard requires more items.

Staff and board

1. Maintain staffing levels at an FTE rate of between 3 and 5 FTE during the plan period. Note that county standards require a minimum of 0.8 staff per 1,000, or about 4.0 for the current population.
2. Develop a plan by the end of 2008 to upgrade staff qualifications by a higher level of staff education support.
3. Starting in 2007, establish and annually implement a program of staff training in emergency procedures such as fire, medical emergencies and related issues. Involve municipal emergency and police officials.
4. At least annually have a meeting between the staff and the library board to discuss public service goals.
5. At least quarterly have staff meetings to discuss needs for library materials and services.
6. Annually review the library long-range plan and policy manual.
7. By 2008, review and re-evaluate the current personnel compensation and benefit package for staff.

Technology plans

9. Move towards state suggested minimum standards for public access workstations of at least 1 per 35 user visits per day. (Presently the library has 5 terminals, which is sufficient for the current 2006 traffic level.)
10. Develop a multi-year technology plan by the year 2008. Include directions for technology in current facility and suggestions for new building.

Programming and Public Service

Tasks:

1. Expand the business Media Center during 2007 and 2008 to include services to the business community and students. Promote the use of the center, including the color copier and other business services.
2. Expand book clubs for adult readers. Provide for at least 2 sessions for discussion groups. Estimated added cost: minimal, use volunteer leaders.
3. Establish and maintain effective method for continuous communication with school personnel regarding school assignments.
4. Establish training and development budget equivalent to 2% of the entire library operating budget. (Estimated cost of \$1,600).
5. Continue having story time sessions for pre-schoolers in the current building, increasing attendance from the current number by 5% per year.
6. Provide classes for the public on Internet access, how to use computers, parental supervision of children's Internet use, and so forth.
7. Perform periodic user surveys starting in 2008 and repeating every 3 to 5 years.
8. Do periodic checks of staff effectiveness by the use of surveys and other assessments.
9. Establish group meetings and workshops for adults in such areas as Investments, Gardening, etc. Aim for increasing the adult attendance at such meetings by 10% per year.

10. During 2008 develop a promotional campaign for the electronic services of the library such as wireless internet service, use of downloaded books for MP-3 players, and the full text databases available.

Building Plans

1. By the end of 2007 finalize a building program statement for use in developing a building program.
2. By 1st quarter 2008 begin fundraising based on successful completion of 501(c)3 application. Develop Fundraising Committee.
3. During 2008, educate the public, board, town, village on the need for a new library building and the added services that will be offered in the building.
4. By the mid 2008 at the latest, begin developing building fund using the Waukesha County Community foundation or another fund.
5. By the end of 2008 or early 2009 begin construction on a new building.

Building Size

In order to calculate the ideal size of a library building, we need to consider the current and projected parameters listed below. The calculations were based on methods recommended by the Wisconsin Division for Libraries, Technology and Community Learning.

The calculations have been done for the current town and village of Eagle with a population projected in 20 years to grow from to 4,633 to 7,000, and projecting population growth in the wider service area (in adjacent towns such as Ottawa and villages like North Prairie) growing from 5,300 to 9,100 in 25 years.

*A building according to state recommendations for this population would be up to **15,925** square feet compared to the current estimated **4,160** square feet.*

Alice Baker Library		MATERIALS			SQUARE FEET RANGE		
Design Criteria	Calculation factor	Low	Moderate	High	Low	Average	High
Population Factor							
	9,100						
Book Volumes	10 volumes per square foot	31,715	42,286	74,001	3,171	4,229	7,400
Current Periodicals	Square foot per title	13	17	30	13	17	30
Back issue periodicals	0.5 Square feet per title per yr.	133	178	311	67	89	155
Nonprint material:	One square foot per item	381	507	888	381	507	888
Public use computer workstations	50 Sq. Ft. per workstation	3.2	4.2	7.4	159	211	370
Reader Seats	20 Sq. Ft. per reader seat	11.9	15.9	27.8	238	317	555
Staff workstations	140 Sq. Ft. per workstation	6.3	8.5	14.8	888	1,184	2,072
Meeting/program room space	10 Sq. Ft. per person plus 100	13.3	17.8	31.1	133	178	311
Conference/board room:	35 Sq ft per conference seat	1.6	2.2	3.8	58	77	135
Storytime room:	15 Sq. Ft. per person plus 50	1.2	1.6	2.8	60	80	141
Computer training lab:	50 sq. Ft. per workstation plus	1.7	2.2	3.9	84	112	197
Special use space	80% to 20% of subtotal				525	700	1,225
Non-assignable Space	20% to 30% of subtotal				1,049	1,398	2,447
Total Square feet					6,825	9,100	15,925

Impact Fees

Impact fees are intended as a method for communities to assess the cost that new residents will have on current services and then assess new residential developments for the estimated impact of those homes. Impact fees cannot be used to close existing deficits in services or facilities. The fees can only be used to maintain standards levels that are based on the impact of new residents. The library currently meets or exceeds all state and county standards, but new residents will add to the costs of building, equipment and library materials.

Note that Alice Baker Memorial Public Library is a joint library, serving the village and town of Eagle. In 2002, the village instituted impact fees with the following schedule:

Type	Town	Village
All residential properties	\$1,019	
Studio or one bedroom apartment		\$483
Two bedroom apartment		\$725
Three bedroom apartment		\$898
Commercial/industrial		N/A

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Appendix Material

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Appendix 1: Public Library Assoc. Recommended Library Service Responses

Note that this is the list of recommended roles that the library planners chose from. The actual roles chosen are on page 9.

1. **Basic Literacy:** addresses the need to read and to perform other essential daily tasks.
2. **Business and Career Information:** addresses a need for information related to business, careers, work, entrepreneurship, personal finances, and obtaining employment.
3. **Commons:** helps address the need of people to meet and interact with others in their community and to participate in public discourse about community issues.
4. **Community Referral:** provides information related to services provided by community agencies and organizations.
5. **Consumer Information:** helps to satisfy the need for information that impacts the ability of community residents to make informed consumer decisions and to help them become more self-sufficient.
6. **Cultural Awareness:** helps satisfy the desire of community residents to gain an understanding of their own cultural heritage and the cultural heritage of others.
7. **Current Topics And Titles:** helps to fulfill community residents' appetite for information about popular cultural and social trends and their desire for satisfying recreational experiences.
8. **Formal Learning Support:** helps students who are enrolled in a formal program of education or who are pursuing their education through a program of home-schooling to attain their educational goals.
9. **General Information:** helps meet the need for information and answers to questions on a broad array of topics related to work, school, and personal life.
10. **Government Information:** helps satisfy the need for information about elected officials and governmental agencies that enable people to participate in the democratic process.
11. **Information Literacy:** helps address the need for skills related to finding, evaluating, and using information effectively.
12. **Lifelong Learning:** helps address the desire for self-directed personal growth and development opportunities.
13. **Local History And Genealogy:** addresses the desire of community residents to know and better understand personal or community heritage.

Appendix 2: State Building Survey

Space Needs Assessment Sheet - Service Parameters –

State data compiled by the WCFLS System Director from the state of Wisconsin records indicate the following for communities of various sizes. The K stands for 1,000.

Popul Category	Number of libraries	Square feet of smallest	Average square feet	Square feet of largest library
b) 100 k	7	56,718	76,788	95,000
c) 50 K	11	28,710	60,210	94,500
d) 25 k	26	5,000	26,244	52,000
e) 10 K	72	2,100	14,597	47,500
f) 5 k	63	1,419	6,450	20,648
g) 2.5 k	79	522	4,031	13,580
h) 1 k	86	360	2,152	8,520
i) 0k	23	400	2,008	9,180

Appendix 3: Space Comparisons Statewide
 66 libraries serving 5,000 to 9,999 population

Municipality	Sum of Square Footage of Library	Sum of Total Service Population 20012	Sq. Feet per capita	Rank of 66	Municipality	Sum of Square Footage of Library	Sum of Total Service Population 20012	Sq. Feet per capita	Rank of 66
Alma	1,500	5,709	0.26	62	Kewaunee	5,000	7,264	0.69	40
Altoona	8,040	8,496	0.95	29	Kiel	6,470	6,462	1.00	24
Arcadia	1,419	5,957	0.24	63	Lake Mills	11,400	6,702	1.70	6
Baldwin	7,345	7,628	0.96	27	Lakewood	3,154	5,145	0.61	48
Berlin	18,868	8,446	2.23	3	Lancaster	8,518	6,324	1.35	12
Bloomer	4,560	6,974	0.65	46	Lodi	7,300	7,973	0.92	30
Boscobel	4,771	5,757	0.83	35	Mayville	7,200	7,096	1.01	23
Brillion	11,537	6,973	1.65	7	McFarland	3,328	9,316	0.36	58
Brodhead	4,200	5,887	0.71	39	Milton	8,000	6,942	1.15	17
Clintonville	14,124	8,092	1.75	5	Mondovi	2,473	8,188	0.30	59
Columbus	7,200	6,957	1.03	20	New Glarus	2,000	5,342	0.37	57
Crandon	8,000	6,547	1.22	14	New Holstein	6,976	6,021	1.16	16
Cross Plains	-	5,313	-	66	North Fond du Lac	2,694	5,729	0.47	55
Cumberland	3,900	5,933	0.66	45	North Lake	3,600	8,820	0.41	56
Darlington	8,900	8,103	1.10	18	Oconto Falls	9,600	9,380	1.02	21
Durand	11,000	5,186	2.12	4	Park Falls	19,056	5,845	3.26	1
Eagle	4,160	5,135	0.81	36	Phillips	5,784	8,797	0.66	44
Eagle River	6,814	9,945	0.69	42	Poynette	3,500	5,222	0.67	43
East Troy	4,800	8,988	0.53	51	Prairie du Sac	5,107	5,984	0.85	33
Edgerton	6,000	6,899	0.87	32	Prescott	8,650	5,249	1.65	8
Ellsworth	2,880	5,928	0.49	53	Random Lake	7,000	6,022	1.16	15
Elm Grove	9,150	6,379	1.43	11	Sauk City	9,200	6,119	1.50	9
Evansville	6,785	6,670	1.02	22	Saukville	11,000	7,460	1.47	10
Fennimore	3,890	7,523	0.52	52	Seymour	6,688	7,668	0.87	31
Florence	5,000	5,112	0.98	26	Slinger	7,200	7,204	1.00	25
Frederic	1,600	5,628	0.28	60	Somerset	3,500	5,387	0.65	47
Grantsburg	5,000	9,283	0.54	50	St. Francis	20,648	8,826	2.34	2
Greenwood	1,500	5,432	0.28	61	Tomahawk	11,465	8,705	1.32	13
Hales Corners	7,438	7,802	0.95	28	Union Grove	7,200	8,579	0.84	34
Hillsboro	3,440	5,002	0.69	41	Walworth	2,653	5,550	0.48	54
Horicon	5,972	5,626	1.06	19	Washburn	4,845	6,634	0.73	38
Hortonville	1,799	7,973	0.23	65	Wautoma	4,400	8,151	0.54	49
					Webster	1,500	6,545	0.23	64
					Westby	4,107	5,463	0.75	37
					Grand Total	<u>422,808</u>	<u>453,397</u>	<u>0.93</u>	

Appendix 4: WI Public Library Standards Compared to Library Actual

Some assume that electronic resources and the Internet are reducing the space requirements in libraries. The opposite is true. Computer workstations take up more cubic feet of space than books and magazines by far. The library is presently participating in a national study on electronic resource assessment called “Counting for Results” with the Colorado Research Center. Data from this report are expected to help in planning efforts. **In addition to the numerical items below, the state recommends a minimum for computer workstations at one for each 35 visitors per day.** At the current rate of visits, that requires at least 4 public access computer workstations – exactly the number now available. Planning for expansion and peak loads could add at least another 4 workstations. That in turn would require another 400 or so square feet of floor space.

The library currently measures up to standards, but future needs are daunting.

State standards for Municipal population	Rate	Term	Depreciation yrs	2006 Actual	Basic	Moderate	Enhanced	Excellent
Staff FTE				4.22	4.00	5.00	6.00	7.00
Volumes Held (Print)				24,471	26,000	28,500	35,000	44,500
Periodical Titles Received				80	85	99	113	137
Audio Recordings Held				1,083	600	950	1,200	1,850
Video Recordings Held				2,231	650	850	1,150	1,550
Hours Open per Week				56	56	57	59	65
Materials Expenditures				\$32,101	\$28,350	\$32,300	\$37,000	\$47,100
Collection (Print, Audio & Video)				27,785	27,500	31,000	37,500	47,500
Salary and benefits	\$26,000	Per FTE	N/A		\$104,000	\$130,000	\$156,000	\$182,000
Volumes Held (Print)	\$20.00	Per vol	15		\$34,667	\$38,000	\$46,667	\$59,333
Periodical Titles Received	\$10.00	per subs	N/A		\$850	\$990	\$1,125	\$1,365
Audio Recordings Held	\$22.00	Per aud	10		\$1,320	\$2,090	\$2,640	\$4,070
Video Recordings Held	\$20.00	Per vid	10		\$1,300	\$1,700	\$2,300	\$3,100
Category				2006 Actual	Basic	Moderate	Enhanced	Excellent
Total Personnel				\$101,950	\$104,000	\$130,000	\$156,000	\$182,000
Materials Expenditures				\$32,101	\$38,137	\$42,780	\$52,732	\$67,868
Other Operating				\$37,584	\$40,000	\$40,000	\$40,000	\$40,000
Combined				\$171,635	\$182,137	\$212,780	\$248,732	\$289,868

Estimated added cost for each		Basic	Moderate	Enhanced	Excellent
Total Personnel		\$2,050	\$28,050	\$54,050	\$80,050
Materials Expenditures		\$6,036	\$10,679	\$20,631	\$35,767
Other Operating		\$2,416	\$2,416	\$2,416	\$2,416
Combined		\$10,502	\$41,145	\$77,097	\$118,233
Added Hours					
Extra staff hours per added hour		0.0	1.0	3.0	9.0
Added staff hours (annualized)		2.5	2.5	2.5	2.5
Staff Cost	\$12.50 Per FTE	-	130	390	1,170
		\$0	\$1,625	\$4,875	\$14,625

Appendix 5: County Library Standards

Libraries must meet all four numerical standards (staff levels, hours open, collection size, and materials budget) to qualify for the exemption. As an alternative, if a library meets the target percentage established in the Library Service Effort Ratio (LSER), it need not meet the four numerical standards. This report details the four numerical standards as well as the LSER. Standards were to be phased in from 75% of state basic for 2002 to 100% in 2008. The Act 150 Committee recommended freezing the implementation of the standards because of state tax caps and the County Board concurred. The standards are frozen through the 2007 budget year for sure but may be renewed beyond that depending on actions by the next state legislature regarding tax caps. Hence the alternates listed below.

Section 23-5 of the County Code sets the **Library Service Effort Ratio**. It is designed to measure a library community’s progress toward meeting resident user library needs. A library could either meet this requirement and serve most of the needs of its community locally or meet the numerical standards. Failure to do either would result in loss of the ability to exempt from the county library levy set (for example) in 2006 for 2007 purposes. According to the county plan, if most of your residents, most of the time, do most of their library business locally, the numerical standards do not apply. This is because residents will not be imposing any undue burden on neighboring libraries.

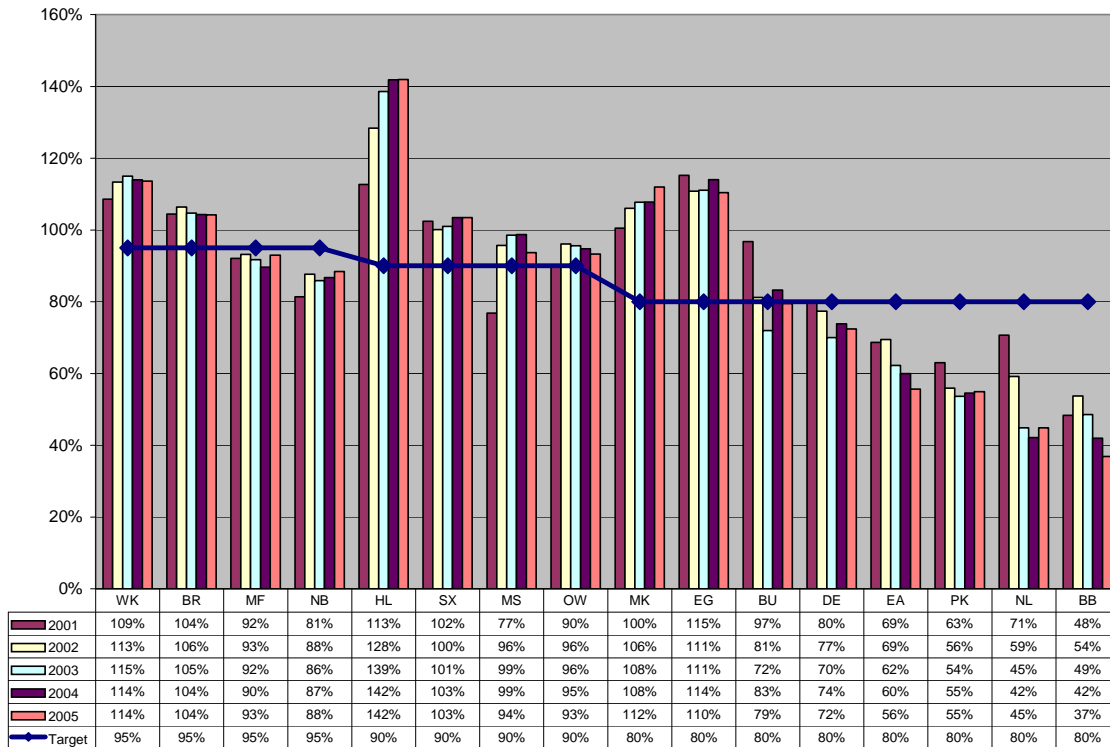
- A ratio below 100% indicates that the community’s residents are disproportionately borrowing materials from libraries other than their own – commonly called a net **crossover borrowing** community.
- A ratio over 100% indicates that the library is a net **crossover lending** community for crossover purposes.

Category	Library Actual	Standard for	Standard for		Standard (at full phase in rate for
Year exemption is granted for	2007	2007	2008		2008
Year annual report is filed	2006	2006	2007		2007
Year annual report regards	2005	2005	2006		2006
Population year used	2003	2003	2004		2004
Population used		5,122	5,181		5,181
Standards phase in ratio		90%	90%		100%
FTE Staff per 1,000 population		0.8	0.8		0.8
Materials Spending per capita		\$5.67	\$5.67		\$5.67
Hours Open per typical week		56.0	56.0		56.0
Collection spending per capita		5.5	5.5		5.5
FTE Staff needed	4.2	3.7	3.7		4.1
Materials budget needed	\$32,101	\$26,138	\$26,439		\$29,376
Hours open needed	56	50	50		56
Collection size needed	27,785	25,354	25,646		28,496
Library Service Effort ratio	60%	80%	80%		80%

Library Service Effort Ratio Report

Section 11-5 of the County Code sets the **Library Service Effort Ratio**. It is designed to measure a library community's progress toward meeting resident user library needs. A library could either meet this requirement and serve most of the needs of its community locally or meet the numerical standards. Failure to do either would result in loss of the ability to exempt from the county library levy set in (for example) 2006 for 2007 purposes. According to the county plan, if most of your residents, most of the time, do most of their library business locally, the numerical standards do not apply. This is because residents will not be imposing any undue burden on neighboring libraries. The **Library Service Effort Ratio** allows library communities to retain exemption from the county levy if their residents do most of their library business at home.

- A ratio below 100% indicates that the community's residents are borrowing materials from libraries other than their own – commonly called a net **crossover borrowing** community.
- A ratio over 100% indicates that the library is a net **crossover lending** community for crossover purposes.



The population sizes divide the libraries into three groups. Larger libraries are assumed to be better able to address the needs of their own residents. Three standard target levels based on population recognize ability to provide resources, services and economies of scale. The population categories and target ratios are as follows:

Population	Ratio
Under 10,000	80%
10,000 to 29,999	90%
Over 30,000	95%

Waukesha County Federated Library System Standards Implementation Steps

Chronology would be comparable for any given year.

ss. 43.64(2m) Wisconsin Statutes provides that:

No city, village, town or school district is exempt from the tax levy under sub. (2) for any year if, by September 1 of the year preceding the year for which the tax is levied, the county board determines that the public library of the city, village, town or school district that is a member of the public library system has not complied with standards approved under s. 43.11 (3) (d).

For a levy set in 2006 for 2007 tax purposes, these are the steps that would need to be taken to implement the exemption noted above.

- **February 2006** - Libraries file annual report indicating the necessary data for hours, staffing, materials collection size and materials spending for the year 2005.
- **May 2006** - System Director files report with the Waukesha County Federated Library System Board regarding the libraries that have met standards and should be granted an exemption based on annual report data.
- **May 2006** - Member libraries may submit documentation indicating extenuating circumstances for not having met the standards in the past and/or for budgetary plans to do so in the current calendar year.
- **July 2006** - System Board submits a report to the County Executive and the County Board indicating which libraries it judges should be granted exemption. Libraries recommended for non-exemption may submit additional documentation directly to the County Board and County Executive for additional consideration.
- **August 30, 2006** - County Board considers exemption issues and determines exemption eligibility as indicated in ss 43.64 (2m). Presentations to the county oversight committee by libraries that are considered ineligible for exemption would be encouraged.
- **November 2006** - County Board sets the levy for 2007 purposes. The levy includes exemptions to the county levy for communities with libraries except those that the county deems ineligible for exemption because of failure to meet the standards.

Appendix 6: State Standards and Alice Baker Actual Amounts.

Comparing 2005 Standards to 1999 State Standards and indicating shortfalls and estimated costs.
 Note that state standards are voluntary not required

	A	B	C	D	E	F	G	H	I	J	K	L
1	Current Materials Budget	\$29,000										
2	Current Staffing Budget	\$102,000										
3	Current other	\$44,000										
4	Current Budget	\$175,000										
5	Population Assumption	6,000										
6	Category	Level	New Standard	Old Standard	New Amount	Old Amount	Actual Amount	Shortfall New	Shortfall Old	Est Unit Cost	Extra for New	Extra for Old
7	Audio	a) Basic	0.2	0.1	1,200	720	930	270		\$50	\$13,500	\$0
8		b) Moderate	0.3	0.2	1,800	1,140	930	870	210	\$50	\$43,500	\$10,500
9		c) Enhanced	0.4	0.2	2,400	1,440	930	1,470	510	\$50	\$73,500	\$25,500
10		d) Excellent	0.5	0.4	3,000	2,220	930	2,070	1,290	\$50	\$103,500	\$64,500
11	Audio, Video, Books	a) Basic	6.1	5.5	36,600	33,000	27,378	9,222	5,622			
12		b) Moderate	6.6	6.2	39,600	37,200	27,378	12,222	9,822			
13		c) Enhanced	7.7	7.5	46,200	45,000	27,378	18,822	17,622			
14		d) Excellent	10.0	9.5	60,000	57,000	27,378	32,622	29,622			
15	Full Time Equivalent Staff	a) Basic	0.8	0.8	4.8	4.8	3.7	1.1	1.1	\$30,000	\$31,875	\$31,875
16		b) Moderate	0.9	1	5.4	6.0	3.7	1.7	2.3	\$30,000	\$49,875	\$67,875
17		c) Enhanced	1.1	1.2	6.6	7.2	3.7	2.9	3.5	\$30,000	\$85,875	\$103,875
18		d) Excellent	1.4	1.4	8.4	8.4	3.7	4.7	4.7	\$30,000	\$139,875	\$139,875
19	Hours open	a) Basic	57	56	57	56	53	4	3	\$1,716	\$6,864	\$5,148
20		b) Moderate	60.0	57.0	60.0	57.0	53.0	7.0	4.0	\$1,716	\$12,012	\$6,864
21		c) Enhanced	61.4	59.0	61.4	59.0	53.0	8.4	6.0	\$1,716	\$14,414	\$10,296
22		d) Excellent	64.8	65.0	64.8	65.0	53.0	11.8	12.0	\$1,716	\$20,249	\$20,592
23	Materials Expenditures	a) Basic	6.2	5.67	\$37,200	\$34,020	\$28,803	\$8,397	\$5,217	N/A		
24		b) Moderate	\$7.20	\$6.46	\$43,200	\$38,760	\$28,803	\$14,397	\$9,957	N/A		
25		c) Enhanced	\$8.60	\$7.40	\$51,600	\$44,400	\$28,803	\$22,797	\$15,597	N/A		
26		d) Excellent	\$10.40	\$9.42	\$62,400	\$56,520	\$28,803	\$33,597	\$27,717	N/A		
27	Periodicals	a) Basic	16	17	97	102	75	22	27	\$50	\$1,080	\$1,350
28		b) Moderate	18	20	107	119	75	32	44	\$50	\$1,590	\$2,190
29		c) Enhanced	21	23	126	135	75	51	60	\$50	\$2,550	\$3,000
30		d) Excellent	24	27	145	164	75	70	89	\$50	\$3,480	\$4,440
31	Videos	a) Basic	0.3	0.13	1,800	780	1,833			\$50	\$0	\$0
32		b) Moderate	0.4	0.17	2,400	1,020	1,833	567		\$50	\$28,350	\$0
33		c) Enhanced	0.4	0.23	2,400	1,380	1,833	567		\$50	\$28,350	\$0
34		d) Excellent	0.7	0.31	4,200	1,860	1,833	2,367		\$50	\$118,350	\$0
35	Book Volumes	a) Basic	5.5	5.2	33,000	31,200	26,942	6,058	4,258	\$25	\$151,450	\$106,450
36		b) Moderate	5.9	5.7	35,400	34,200	26,942	8,458	7,258	\$25	\$211,450	\$181,450
37		c) Enhanced	6.8	7.0	40,800	42,000	26,942	13,858	15,058	\$25	\$346,450	\$376,450
38		d) Excellent	9.0	8.9	54,000	53,400	26,942	27,058	26,458	\$25	\$676,450	\$661,450

Appendix 7: HALPR Ratings for Library.
 (Hennen's American Public Library Ratings)

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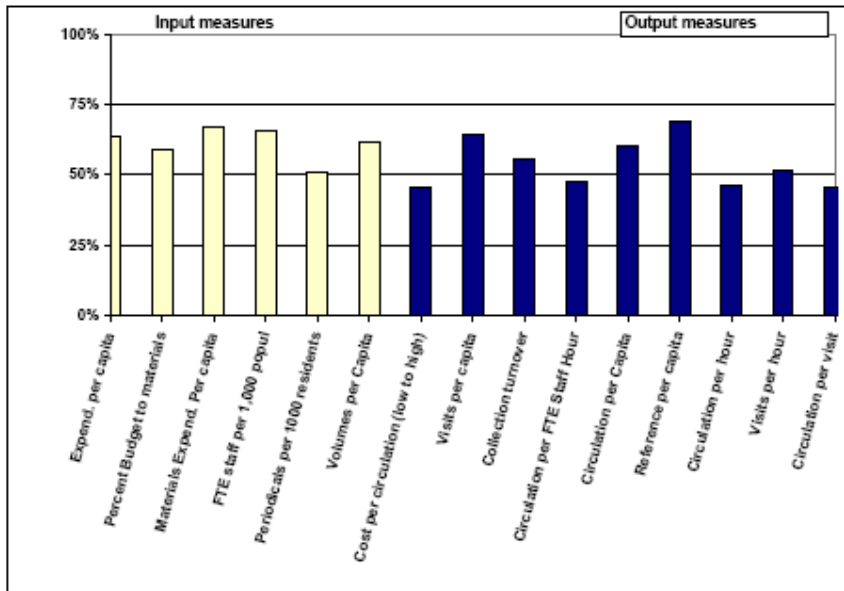
Thomas J. Hennen Jr.

Hennen's American Public Library Ratings Report 2006 (Using 2004 Report Data)

ALICE BAKER MEMORIAL PUBLIC LIBRARY

January 20, 2007

Number of Libraries in this Population Category:	1,768
HALPR Score for this Library	576
Rank of Libraries in this population category	561
Percentile	62.0%



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Table 1. Data, Rank and Percentile

Number of Libraries in this Population Category: 1768

HALPR Score for this Library		576
Rank of Libraries in this population category		561
Percentile		62%

Name of Library **ALICE BAKER MEMORIAL PUBLIC LIBRARY**

Address 820 E. MAIN ST.
 City EAGLE
 State WI
 Zip 53119

Population	5,493
FTE Staff	3.6
Collection Expend.	\$25,492
Total Expend.	\$163,726
Book Volumes	25,314
Periodical Subscr	56
Hours of service	2,352
Visits	31,000
Reference	4,200
Circulation	42,587

Note that population used is the service area population assigned by the Federal State Cooperative Service (U.S. Department of Education) not the census data population of the community. Based on data filed in 2005 (calendar or fiscal 2004).

Factor	Amount	Rank	Percentile
Expend. per capita	\$29.81	534	64%
Percent Budget to materials	15.6%	607	59%
Materials Expend. Per capita	\$4.64	489	67%
FTE staff per 1,000 popul	0.65	511	65%
Periodicals per 1000 residents	10.2	725	51%
Volumes per Capita	4.6	565	62%
Cost per circulation (low to high)	\$3.84	807	45%
Visits per capita	5.6	525	64%
Collection turnover	1.7	655	56%
Circulation per FTE Staff Hour	5.7	768	48%
Circulation per Capita	7.8	585	60%
Reference per capita	0.8	453	69%
Circulation per hour	18.1	791	46%
Visits per hour	13.2	716	51%
Circulation per visit	1.4	803	46%

INPUT DATA

OUTPUT DATA

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Table 2. Percentile Comparisons for Input and Output Measures

Number of Libraries in this Population Category: 1768

Measurement Category	HALPR Weight	ALICE BAKER MEMORIAL PUBLIC	75th Percentile	50th Percentile	25th Percentile
Expend. per capita	3	\$29.81	\$36.89	\$23.27	\$13.34
Percent Budget to materials	2	15.6%	18.3%	14.4%	10.9%
Materials Expend. Per capita	2	\$4.64	\$5.52	\$3.33	\$1.78
FTE staff per 1,000 popul	2	0.65	0.76	0.52	0.33
Periodicals per 1000 residents	1	10.2	14.5	10.0	5.9
Volumes per Capita	1	4.61	5.63	4.11	2.97
Cost/circulation (low to high!)	3	\$3.84	\$5.26	\$3.61	\$2.58
Visits per capita	3	5.64	6.78	4.32	2.52
Collection turnover	2	1.68	2.23	1.57	1.03
Circulation per FTE Staff Hour	2	5.72	8.32	5.89	4.24
Circulation per Capita	2	7.75	10.13	6.45	3.75
Reference per capita	2	0.76	0.91	0.43	0.19
Circulation per hour	2	18.11	28.70	19.11	11.93
Visits per hour	1	13.18	19.56	12.89	7.91
Circulation per visit	1	1.37	1.98	1.44	1.02

The HALPR Index adds the scores for each library within a population category to develop a weighted score. The population categories change at **500,000; 250,000; 100,000; 50,000; 25,000; 10,000; 5,000; 2,500 and 1,000**. The HALPR Index is similar to an ACT or SAT score with a theoretical minimum of 1 and a maximum of 1,000, although most libraries score between 260 and 730. The index includes data for print services, book checkouts, reference service, funding and staffing. It excludes audio and video data, as well as Internet access and other electronic measurement.

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