

Information about the Wisconsin Public Library Consortium

(Based on an article written in 2014 by Sara Gold, Stef Morrill and Bruce Smith)

Background

The Wisconsin Public Library Consortium (WPLC) was formed in 2001 when a handful of public library system directors signed the back of a napkin establishing their commitment to collaborate on new projects. These future-thinking system directors saw a need for an organization in Wisconsin where library systems could partner on projects that move libraries forward through experimentation and R&D.

The main and most popular service the consortium has developed is the Wisconsin Digital Library, which is available to all Wisconsin residents with a public library card. The digital library provides access for library patrons to digital audio and e-books as well as other e-content on a wide range of subjects. Most content is available via a contract with OverDrive, in addition to titles in the public domain.

In 2015, the use of the WPLC OverDrive collection surpassed the use of any other consortium in the country, with 3.6 million circulations. The collection has been used by over 370,000 unique users over the years, and we continue to add new users each month.

The Wisconsin Digital Library began with a small collection of audiobook titles from NetLibrary. The WPLC signed a contract with OverDrive in 2005 and began developing an audiobook collection originally named the WPLC Digital Books Collection. In October 2009, the first ebook order was placed. In 2010 the WPLC collection budget was \$92,000. At that time, multiple formats of digital audio and e-books had to be purchased. The collection heavily favored digital audiobooks.

With the demand for digital content ever increasing, the Wisconsin Division for Libraries, Technology, and Community Learning (DLTCL) convened an eBook summit in 2011. This summit inspired a commitment by DLTCL and the public library systems to annually fund a \$1 million e-content buying pool that would be managed by the WPLC. From 2011-2014, DLTCL committed some LSTA funds to the buying pool to foster its growth while in the “experimental” phase.

Each of the 17 public library systems contribute a share of the buying pool and to the overall operations of WPLC. Within each system, there is the flexibility to fund their share of WPLC according to what works for them, whether by fully funded the amount out of state money received by the systems or by a combination of system funding and member library contributions. (See Appendix A for details on the budget process for WPLC and formulas used.)

While each system contributes to the buying pool for the state, many of them also purchase additional content that is available for their system only. Called “OverDrive Advantage,” this program allows systems to purchase extra copies or titles that would only be of interest to their patrons. The amount each system spends on OverDrive Advantage is completely up to them.

Governance

Each library system is a partner in the WPLC and has one seat on the WPLC Board. While the Board has been the main governance body since the consortium’s inception, the continued growth and importance of the digital library led to a governance change. Starting in 2014, a new Digital Library Steering Committee (DLSC), which is composed mostly of member library representatives from the public library systems, is charged with managing the operation of the Wisconsin Digital Library.

The reason for this change is twofold: first, the majority of financial support for the collection is now provided by the member libraries of the public library systems, so it made sense for the libraries to have the main role in shaping the direction of the digital library. Second, the growth in the digital library service led to it becoming the dominant work of the WPLC board. Having the DLSC oversee the digital library frees the board to develop other new projects and allows them to continue to fulfill the vision they had when they committed to starting the consortium back in 2001.

There are is one main subcommittee (Selection Committee) that falls under the DLSC and one temporary workgroup (Digital Collection Workgroup) that convenes annually.

The Selection Committee is charged with choosing and buying content for the digital library collection. Titles and copies are added to the collection in one of three ways:

1. Title is selected by a selection committee member.
2. Title is already in the collection, but the number of holds necessitates adding copies.
3. Title is requested by at least three patrons.

Some details about WPLC governance...

- The WPLC Board meets quarterly.
- The DLSC meets every other month.
- There are 17 people on the board and XX on the DLSC.
- A DPI representative attends the Board meetings, but is not a voting member.
- There are no term limits for either of the main governing bodies. Systems select who represents them on each body.
- Each system has two representatives on the Selection Committee. XX of those selectors focus on titles for children and young adults.
- The Digital Collection Workgroup is made up of representatives of the Board, DLSC, and Selection Committee.

The Selection Committee uses a collection policy to guide decision making about the collection, which they review annual in conjunction with the Digital Collection Workgroup (see Appendix B)

The Digital Collection Workgroup evaluates the collection on an annual basis and makes a recommendation to the DLSC on the amount for the buying pool. The workgroup reviews collection statistics, surveys both patrons and libraries, and investigates new formats in order to develop the buying pool recommendation along with other recommendations related to the collection (see Appendix C for an example of their recommendations).

Appendix A: An explanation of the Wisconsin Public Library Consortium (WPLC) budget

There are two components to the WPLC budget:

1. Digital buying pool
2. WPLC member shares

Each component has a different purpose and a different decision-making process as described below.

Digital buying pool

The digital buying pool is used to purchase *content* for the Wisconsin Digital Library. For 2016, the buying pool amount has been set at \$1,000,000. This amount is divided among the 17 public library using a formula that involves the following steps:

1. Determine each system's percentage of the total population of the state.
2. Determine each system's percentage of the previous year's circulation of the Wisconsin Digital Library materials.
3. Multiply the percentage of previous year's circulation by 3 (to weight it at 75% of the total) and add the system's percentage of the total population of the state.
4. Divide the number by four to find the percent of the \$1,000,000 buying pool that system will contribute.
5. Multiply that percentage by the buying pool amount for the dollar figure.

Let's walk through an example of the steps:

1. Determine each system's percentage of the total population of the state.

For purposes of this example, let's say the system has 25% of the total population of the state.

2. Determine each system's percentage of the previous year's circulation of the Wisconsin Digital Library materials.

Again, for purposes of this example, let's say the system has 15% of the previous year's circulation.

3. Multiply the percentage of previous year's circulation by 3 (to weight it at 75% of the total) and add the system's percentage of the total population of the state.

$$(15 * 3) + 25 = 70$$

4. Divide the number by four to find the percent of the \$1,000,000 buying pool that system will contribute.

$$70 / 4 = 17.5\%$$

5. Multiply that percentage by the buying pool amount for the dollar figure.

$$17.5\% * \$1,000,000 = \$175,000$$

The process to determine the total buying pool amount involves multiple bodies and provides opportunity for feedback from the entire community. It begins with the Digital Collection Workgroup, which reviews issues and requests related to the collection, asks for feedback from patrons and library staff, and analyzes usage statistics to create a recommendation for the following year's buying pool amount. This recommendation is proposed to the Digital Collection Steering Committee, who either accepts or modifies the recommendation, and then sends the recommendation on to the WPLC Board, who incorporates the recommendation into the following year's budget.

Once a recommendation is made by the Digital Collection Workgroup, the amount of the buying pool for each system is calculated based on the formula described above. The amounts are distributed to each system's representatives on the Steering Committee and Board for their review and for them to collect feedback from their member libraries.

Opportunities for feedback are provided for member libraries and system staff prior to the Steering Committee meeting where the recommendation is acted upon.

WPLC member shares

The WPLC member shares budget is used to *provide support and funding for the WPLC consortium itself*. The member shares pay for project management, the consortium's website, platform fees, a designated fund for research and development, and a designated reserve fund. In 2016, the amount of the member shares is \$86,000. The amount is divided among the 17 systems based on population shares. Each system is assigned a share amount based on their population:

<300,000	1
300,001-600,000	1.5
600,001-900,000	2
>900,001	2.5

The dollar amount of the member shares is divided by the total number of shares for all 17 systems to calculate a cost per share. This amount is then multiplied by the amount of shares for each system to determine the amount each system will contribute.

The annual WPLC member shares amount is determined by the WPLC board.

Appendix B: WPLC Collection Development Policy

WPLC Collection Development Policy

- I. Mission & Vision
- II. Purpose
- III. Collection Development
 - a. Collection Responsibilities
 - b. Scope of Collection
 - c. Selection Criteria
 - d. Selection Tools
 - e. Gift Policy
 - f. Weeding
- IV. Intellectual Freedom
 - a. Access to Collections
 - b. Reconsideration of Materials
- V. Review of Policy

I. Mission & Vision

The Wisconsin Public Library Consortium (WPLC) was created and is intended to provide Wisconsin residents with public library cards access to a collection of electronically published materials in a wide range of subjects and formats. It also provides a decision-making and fiscal model for public library cooperation that encourages libraries to collaborate, while exploring and implementing new information technologies and issues. This model emphasizes sharing costs as well as knowledge and resources.

II. Purpose

This policy acts as a guide for selectors in order to ensure comparability of collection depth and breadth between collection areas and similarity of selection criteria among selectors within the centralized collection management framework. This policy intends to assist selectors in building collections that are responsive to the community's informational and recreational reading needs, while still meeting the mission and goals of both the WPLC and public libraries.

This policy also informs the public of the principles upon which collection development and management decisions are based. This policy describes the role of selection and management in the mission of the WPLC to serve a statewide community of library users. It defines the scope of the collection, provides a plan for continual and strategic development, and identifies strengths in the collection. It connects selection decisions and collection management to intellectual freedom principles.

III. Collection Development

A. Collection Responsibilities

Ideally, the WPLC Selection Committee is comprised of 34 consistently active members, 2 librarians from each of the 17 library systems in Wisconsin. Each library system director nominates their respective selectors and each selector is appointed to a two-year term. If a selector is unable to fulfill their term, a replacement will complete the appointed term. **If a system has a lack of nominees, nominees will be**

selected from a system in the same geographic area as the original nominating system. Selectors must participate in both selection and monthly meetings. Selection for specific areas of development will be allocated by interest, knowledgeable expertise, and qualification. The Selection Committee will be divided into two subcommittees: Adult and Young Adult/ Children's selection.

B. Scope of Collection

The WPLC is funded by its member library systems, also known as Partners. Partners of the WPLC pay into the consortium and any partner library system has access to the digital collaborative collection and as such, their library card-holders are authorized users. Library system partners may choose to ask their member libraries to contribute to the WPLC payments as they deem necessary and appropriate. The community served by this collection is incredibly diverse and as such, the collection must reflect the needs, interests, and viewpoints of this large community in its entirety, taking into consideration access needs in a digital environment.

The collection is broad, current, and popular. This collection is not concerned with being completely comprehensive and some subject areas are collected in greater depth than others, as a reflection of current use and demand. The WPLC aims for a balance of popular materials and those in line with the institutional goals of public libraries. The materials chosen support general interest in a broad range of categories. This collection is intended to serve the general patron instead of the researcher. Titles selected reflect contemporary significance instead of long-term enduring value.

A variety of reading and comprehension levels are also represented in the collection, based on community need. Materials in languages other than English will be added as determined by community need and title availability. The collection also includes materials that are classified as local content either by an author, publisher or subject matter relating to Wisconsin and the Midwest and are locally procured by selectors rather than purchased through a distributor.

Currently, the collection is comprised of e-books, digital audio books, and video. Materials are selected to support a variety of computer systems and e-reader hardware in multiple prevailing formats in order to serve the differing needs of individual users. The WPLC is not actively purchasing new video titles. As streaming video evolves and more titles are available for purchase, we will revisit adding titles to the video collection.

C. Selection Criteria

The following criteria are taken into consideration when selectors are choosing materials. An item need not meet all of the criteria to be selected.

- Identified, expressed, or anticipated demand in the general community
- Availability of titles from vendors
- Contemporary significance, popular interest or permanent value
- Attention of critics and reviewers
- Prominence, authority, significance, and/or competence of author or creator
- Timeliness and accuracy of material including new editions of existing materials.
- Relation to existing collections, such as titles in a series.

- Statement of challenging, original, or alternative point of view
- Authenticity of historical, regional, or social setting
- Suitability of subject matter for youth
- Appropriate reading level for youth

Public demand for an author, title or subject is an important criterion. All requests from patrons for specific authors, titles or subjects will be considered.

Title availability is another important consideration. Given the volatile world of digital rights and publishers, it is important to note that although titles may be available for purchase to consumers from various outlets, they may not be available to WPLC patrons because certain major publishers do not allow public libraries to purchase digital editions of titles, and/or place embargos on new titles for a designated time period.

In addition to content and availability criteria for selection, given the digital nature of this collection, selectors must also take into consideration format factors. The following criteria will be considered.

- Affordability
- Appropriateness of format
- Illustration rendering in books for youth or in graphic novels
- Narrator's qualifications for audio books
- Stability of content
- Titles with simultaneous use rights

As a rule, we do not purchase abridged versions of titles. Exceptions can be made on a case by case basis.

D. Patron Recommended Materials

Input from patrons is highly valued and therefore patrons are able to recommend for purchase up to 3 titles per month. It is important to note that due to the very large population this collection serves, the recommendation process is limited by a monthly monetary limit. In addition, titles must fit the criteria for selection described in this policy and must be of interest to a larger audience. The decision to add or not add patron recommended titles is at the discretion of WPLC selection committee members and is not open to appeal.

F. Gift Policy

Given technical and licensing limitations as they stand today, the WPLC is unable to accept gifts of personally purchased e-books. Donated money earmarked for specific e-books or digital audio books is accepted, though items must meet the selection criteria outlined above.

No conditions may be imposed relating to any gift either before or after its acceptance by the WPLC with an understanding that donated materials are subject to the same selection, evaluation, and disposal criteria as material selected for purchase.

G. Weeding

Although a digital collection does not have the same space constraints of a physical collection, weeding is necessary to upgrade the collection in terms of relevancy, usefulness, patron ease of searching and circulation statistics. Weeding also allows for greater review of the collection, helping to determine gaps and deficiencies, assisting selectors in creating a collection that is more responsive to patron demand and need. The WPLC Project Manager will be responsible for facilitating the review of the WPLC digital collection on a quarterly basis and determine which titles warrant being weeded. Since weeding a cooperative collection will affect a large number of libraries, any weeding project must be carefully coordinated and communicated to all partners prior to and during the process. Non-Fiction travel, health, self-help, business, inspiration by date. Weeding extra copies of best-sellers. Removing obsolete formats. In addition, titles may be pulled from the WPLC collection at any time by publishers without prior notice or titles may not be available for re-purchase.

H. Advantage Collections

Public library systems within the WPLC have the option to establish collections of materials that are only accessible by their patrons. The purpose of these collections are two-fold: to allow systems to purchase additional copies of high demand titles specifically for their patrons to help abate holds and to allow systems to purchase titles unavailable to the shared collection due to publisher restrictions. Systems with Advantage Collections are encouraged to follow the WPLC Collection Policy.

IV. Intellectual Freedom

The WPLC aims to provide a collection with information spanning a broad spectrum of opinions. The WPLC directs patrons to the American Library Association's Library Bill of Rights, Freedom to Read, and Freedom to View statements. These principles guide the materials selection policies.

Selection decisions are based on the merit of works as they relate to the mission and goals of the WPLC and its partners. Works are selected to meet expressed and anticipated needs of the statewide community. These works are inclusive of statewide cultures and opinions, not just the opinions of a particular community. Selectors are located all across the state to ensure a fair and balanced collection. Variety and balance of opinion is sought in all collections.

The library recognizes that some materials may be controversial or offensive to an individual, but maintains that individuals can apply their values to only themselves. Parents have the responsibility and right to guide the values of their children. An opinion represented in the collection is an expression of the libraries' commitment to intellectual freedom and not an endorsement of a point of view or opinion.

B. Request for Reconsideration policy

Patrons wanting to communicate their concerns about materials in the WPLC digital collection, should be directed to a reconsideration form available on the WPLC website. Any requests will be directed by the WPLC Project Manager to the WPLC Chair for discussion. A recommendation for action will be made by the WPLC Chair to the WPLC Board.

V. Review of Policy

This policy will be revisited by WPLC Selection Committee who will recommend changes or revisions to the WPLC Steering Committee on a yearly basis.

Appendix C: Sample Digital Collection Workgroup Recommendations

The Digital Collection Workgroup met on March 19, 2015 to consider a number of issues related to the current WPLC digital collection. The workgroup made a series of recommendations, based on use statistics from OverDrive and survey results from patrons and library staff. A summary document describing the issues discussed by the committee, along with the related survey data, is included with this document. Usage statistics and other information can be found at the workgroup page on the WPLC website: <http://www.wplc.info/node/246>

The workgroup had made the following recommendations:

1. Encourage Advantage collections to purchase copies of popular materials and purchase unique materials at the state level.

The group discussed the role of Advantage collections, and recommended that WPLC encourage systems with Advantage collections to focus funds on purchasing copies of popular materials and to make recommendations for the statewide collection for unique materials, rather than purchasing them for their own system-level collections. Because Advantage collections have a limited audience, purchasing unique materials at that level naturally limits the audience and will result in less use than if an item were added to the statewide collection. Because there are often high numbers of holds from all systems on popular items, adding copies of these items will provide the most use of the invested dollars as the copies are likely to have high circulation, even with a more limited audience.

2. Increase the holds ratio for best sellers; ask the Selection Committee to consider a two-tiered system of holds ratios.

The survey results suggest that many patrons could tolerate a higher holds ratio for popular materials. The Selection Committee currently strives to collect 1 copy for every 5 holds. Changing this ratio to 7-to-1 for the entire shared collection or introducing a two-tiered system with a higher ratio (such as 7-to-1) for most titles and a 5-to-1 ratio for the most popular titles would decrease the amount spent on added copies and allow WPLC to invest in some other areas and more unique content. Encouraging systems to add copies through their Advantage collections would help to decrease wait time for popular items, even if the holds ratio was increased (see recommendation 1 above).

3. Purchase patron requests only when a certain number of requests are received for a title.

The RTL (Request to Library) feature in OverDrive is popular, and WPLC consistently receives significantly more requests for items than the budget allocated for patron requests. While the library survey results point to a desire to fulfill patron requests, it also suggested that requests should be vetted to make sure the requested title is high quality and adds value to the collection. In order to meet both of these needs, the workgroup recommends that patron requests be purchased only when a certain number of requests are received for a title. The number of requests to trigger a purchase will be determined by the selection committee. The expectation is that this recommendation would reduce the amount spent on patron requests.

4. Add a pilot Spanish language collection, focused on translated bestsellers and children's materials.

The workgroup felt that adding a small Spanish language collection would be appropriate, and suggested an allocation of \$5,000 to purchase a pilot collection in 2016. The usage statistics would be monitored and the collection evaluated prior to the 2017 allocation of the buying pool. The group felt that the most use of Spanish language materials in print collections are of translated bestsellers and children's materials, and are therefore recommending the same formulation for the pilot digital collection.

5. Stop purchasing music and remove the existing music collection.

Very little of the digital collection budget has been invested in music, and there was little evidence in the library and patron surveys to suggest value in investing the significant funds that would be needed to make a viable music collection. The workgroup is recommending that WPLC stop purchasing music and remove the existing music collection from the OverDrive interface, as the collection is small and not very popular.

6. Stop purchasing video, remove video that is only downloadable, keep the streaming video, and re-evaluate this format in a year.

While the streaming video format in OverDrive has had some use, there are some factors that make this collection less desirable for patrons:

- Titles are not available for unlimited simultaneous use, and patrons do not like the model of having to wait for streaming video.
- New, popular titles are not available.

The workgroup recommends that WPLC stop purchasing OverDrive video at this time and evaluate video as a format in one year as the 2017 buying pool allocation is prepared.

The workgroup also recommends that current videos that are not streaming (only downloadable) be removed from the collection. These videos are old and not being used.

7. Allocate more funds toward audiobooks.

The survey results and usage statistics point to a need to increase the amount of funds spent each year for audiobooks. In the past, funds for audiobooks were shifted to ebooks in order to meet the significant demand for that format. The workgroup is suggesting that funds now be shifted back to audiobooks to help revitalize this lagging format. Recommendation #1 will also assist with this goal, as Advantage accounts would be encourage to purchase additional copies in both audiobook and ebook formats, as budgets allow.

8. Budget \$50,000 for OverDrive magazines of the buying pool for OverDrive magazines.

The Digital Magazines Workgroup recommended that WPLC budget \$75,000 of the 2016 WPLC buying pool to subscribe to approximately 100 magazine titles from Over Drive Periodicals. This workgroup felt that the librarian and patron surveys suggested enough interest in magazines to support the recommendation of adding magazines to the collection. In order to keep the addition within the existing buying pool budget, the workgroup modified the

recommendation to suggest that WPLC budget \$50,000 (rather than \$75,000) from the buying pool and that WPLC use a portion of the WPLC reserve budget to purchase any additional copies or titles beyond the \$50,000 if deemed necessary during 2016. This subscription would be considered a pilot of the format, and use would be closely monitored in order to purchase additional copies as needed and also to determine interest and the potential need for a larger investment. If the pilot shows interest and use of this format, the workgroup would expect that additional funds may needed to move from a pilot into a permanent part of the WPLC digital collection.

9. Keep the WPLC digital buying pool amount at \$1,000,000 for 2016.

While the workgroup is proposing some changes to the collection, the Select Committee representatives on the workgroup felt that these changes could be accommodated within the \$1,000,000 buying pool this year. As mentioned in the magazines recommendation (see Recommendation 8), the changes made this year, particularly the addition of the magazines, should be monitored and evaluated to determine if more resources are needed as next year's buying pool allocation is considered.