

## OWLS Services and Fees

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OWLS and its member libraries have a complex financial relationship. Consequently, there are many reasons why a member library might be paying OWLS, and there are several reasons why OWLS might be paying a member library. This document attempts to clarify the financial relationship between OWLS and member libraries by explaining the services OWLS provides, the charges to libraries for some services, and the payments that are exchanged between the system and its members.

### Statutory Service Requirements – Provided for Free

In order to qualify for state funding, OWLS is required to provide ten statutorily mandated services to its member libraries. OWLS does not charge its member libraries for any of these services, i.e. they are provided for free.

- Backup reference, information and interlibrary loan services from the system resource library, including the development of and access to specialized collections.
  - OWLS has a contract with Appleton Public Library that makes their resources and services available to all member libraries.
- Referral or routing of reference and interlibrary loan requests from libraries within the system to libraries within and outside the system.
  - OWLS contracts with Nicolet Federated Library System to manage interlibrary loan outside of OWLSnet.
- In-service training for participating public library personnel and trustees.
  - OWLS sponsors numerous workshops and webinars, provides continuing education scholarships to member library staff, and provides one-on-one training on many topics.
- Electronic delivery of information and physical delivery of library materials to participating libraries.
  - OWLS contracts with Waltco and South Central Library System to provide systemwide and statewide delivery services for member libraries. Delivery services enable the efficient sharing of resources among libraries which is necessary for filling patron requests in a timely and cost-effective manner.
- Service agreements with all adjacent library systems.
  - OWLS has service agreements with adjacent systems that allow system residents to use libraries in neighboring systems, allow member library staff to attend programs and workshops in neighboring systems, and provides access to resources of neighboring systems.
  - Some of these agreements result in OWLS libraries being paid for serving residents of adjacent systems. In these cases, OWLS collects usage data, bills neighboring systems, and distributes their payments to OWLS libraries.

- Professional consultant services to participating public libraries.
  - OWLS professional staff is available to provide consultant services in many different areas, including library administration, collection building, space utilization, planning, legislation, legal issues, social media, staff training, and more.
- Promotion and facilitation of library service to users with special needs.
  - OWLS obtains grants, coordinates projects, provides training, and shares information with member libraries about serving persons with special needs.
- Cooperation, planning, and agreements with other types of libraries in the system area for the appropriate sharing of library resources to benefit the clientele of all libraries in the system area.
  - OWLS participates in the Fox Valley Library Council (FVLC), which is an association of area public, academic, and special libraries. OWLS also underwrites the cost of member library participation in FVLC.
- Planning with the division and with libraries in the area in regard to library technology and the sharing of resources.
  - OWLS regularly engages in planning that results in the development of a new state-approved systemwide Technology and Resource Sharing Plan every three years. Because OWLS has a systemwide plan, member libraries are eligible to participate in the federal E-rate program and the TEACH Wisconsin program without submitting their own plans.
- Written agreements with member libraries stating that they agree to provide the same services to any resident of the system area that they provide to local residents and to interlibrary loan materials to other libraries in the system.
  - Such agreements ensure that member libraries have access to the materials of other member libraries and that their local residents can use other system libraries.

#### Non-mandated Services – Provided for Free

It is also permissible for OWLS to provide any other service programs designed to meet the needs of participating public libraries and the residents of the system area, as determined by the system board after consultation with participating public libraries.

- Coordination of County Budget Requests and Payments  
 OWLS is one of several systems that coordinates countywide library service, i.e., developing county library service plans, collecting data, preparing county budget requests, and distributing county payments to libraries. In many systems, county library boards fill this role. However, in areas where the system functions as the de facto county library board, counties pay considerably higher reimbursement rates. OWLS libraries are currently reimbursed for nearly 100% of their costs for providing countywide library service. Many counties in the state pay closer to the 70% statutory minimum.

- Computer support and technical assistance  
OWLS staff assists local libraries in selecting, ordering, installing, troubleshooting, and repairing local library computers and other hardware. While local libraries pay for and own their hardware, there is no charge for OWLS assistance and support.
- Web Support  
OWLS designs websites, purchases and maintains domain names, and provides website hosting services for member libraries. OWLS staff trains library staff to maintain their websites and provides troubleshooting and support for their sites.
- Digital Media Support  
OWLS is a founding member of the Wisconsin Public Library Consortium (WPLC) that has established and funded a statewide collection of e-books and downloadable audiobooks. OWLS also provides E-book reader and digital audiobook player training and support to member libraries.
- E-Rate Filing  
OWLS staff files for federal e-rate funding for telephone service for most member libraries. OWLS libraries receive \$150 - \$2000 in annual reimbursements, depending on the amount of their telephone bills.
- Support for Youth Services  
OWLS regularly contracts with a member library youth services librarian to facilitate the sharing of information about services to children and young adults. OWLS also provides grants for summer library program (SLP) performers, provides SLP materials to libraries, and subsidizes the purchase of books used as SLP incentives and prizes.

#### Non-mandated Service – Minimal Charges Apply

- Graphic Arts Services  
OWLS provides professional graphic design and reproduction services for member libraries. All design services are free, and minimal charges apply for the reproduction materials. Basically, member libraries are only charged for the cost of supplies, which makes OWLS reproduction services much less expensive than a commercial print shop.

#### OWLSnet – Non-mandated Service – Charges Apply

OWLSnet is the shared library automation network that OWLS operates for libraries in the OWLS and Nicolet systems. Participating libraries pay an annual OWLSnet membership fee to help pay for this program. It costs nearly \$1,000,000 annually to operate this program. The two systems pay approximately 50% of the cost, and the 50 participating libraries pay approximately 50% of the cost.

OWLSnet provides non-mandated technology-related services to participating libraries that far exceed those provided by many other Wisconsin public library systems. While it's difficult to list all the services included in OWLSnet membership, they can be best understood by listing them in a few different categories.

- Integrated Library System (ILS)
  - OWLSnet uses Innovative Sierra ILS software to provide its members with online circulation control, patron registration, patron database, cataloging, acquisitions, bibliographic database, and an online public access catalog named InfoSoup.
  - OWLSnet pays all annual maintenance charges for hardware and software. The ILS software and hardware are regularly upgraded, and member libraries are never asked to contribute to the significant cost of these upgrades.
  - OWLS staff administers the ILS and oversees server operation.
  - OWLS and Appleton Public Library cooperate to provide professional cataloging services.
  - A variety of standard reports, notices, and custom reports are provided to meet library needs.
  - Training and support is provided to member library staff in all aspects of ILS operation.
  - Library cards, registration forms, other forms, and occasional publicity materials are provided to members.
  - Email notifications and SMS (text messaging) notifications are available to local library patrons.
  - OWLS staff coordinates the development or addition of content to InfoSoup to enhance patrons' experience with the catalog, e.g., book review blogs, booklists, research and job assistance pages, access to digital materials, readers' advisory tools, and announcement of events of interest to readers and library users. (Most booklists are produced by Appleton Public Library staff, and staff and users from a number of libraries contribute book reviews.)
  
- Network Infrastructure
  - OWLSnet maintains an environmentally controlled computer room with a bank of servers needed to provide services to participating libraries. Servers are administered, backed up, and have an automatic shutdown system for power failures.
  - OWLSnet provides, manages, and maintains the telecommunications network for participating libraries, including central site equipment and routers and switches at local libraries. Libraries are connected via the BudgetNet Converged Network, and rates are subsidized by the TEACH Wisconsin program.
  - OWLSnet manages the wireless networks in member libraries and maintains local library wireless access points.
  - OWLSnet provides Internet access over its network infrastructure.
  
- Software
  - OWLSnet provides and supports email service for local library staff, including providing spam filtering.
  - OWLSnet provides antivirus software for all local library computers.
  - OWLSnet provides SAM workstation management software, Deep Freeze security software, and manages Windows and other software updates for public access computers, which are unable to update automatically due to management and security software.
  - OWLSnet provides, supports, and trains library staff in the use of CONTENTdm software, which allows local libraries to digitize unique local resources and share them online.
  
- Additional Content
  - OWLSnet provides additional content to member libraries and patrons, e.g., Recorded Books OneClickDigital, Overdrive Advantage Program, Ancestry Library Edition, Worldcat, and TumbleBooks.

## Cooperative Purchasing and Pass-Through Payments

Local library payments to OWLS are often reimbursements for equipment and supplies that have been purchased by libraries or payments that have been made on their behalf.

- **Equipment**  
OWLS regularly orders computers, printers, receipt printers, and barcode scanners for member libraries. OWLS pays for this equipment and then bills member libraries for reimbursement.
- **Supplies**  
In order to take advantage of economies of scale and larger discounts, OWLS frequently purchases and stocks specialized supplies that are re-sold to member libraries, e.g., receipt paper, barcode labels for library materials, spine labels, InfoSoup bags.
- **Pass-Through Payments**  
It's not uncommon for OWLS to pay for a project that involves multiple libraries and then bill the libraries for their shares.

Beginning in 2012, libraries statewide have started contributing a portion of their materials budgets to the statewide digital media buying pool. These funds are being used to purchase E-books and downloadable audiobooks that are available to patrons throughout the state. This is a good example of pass-through payments, as OWLS paid all of its member libraries' shares, and the libraries were billed and reimbursed OWLS.