A consortium of member Wisconsin libraries that offers services in areas of shared bibliographic information, resource sharing, inservice training, and other cooperative activities relating to the changing nature of information technology.
Review of 2008-2009

WiLS Year at a Glance

• Record-setting year for WiLS ILL with 128,042 requests received.
• Re-structure of WiLS membership categories and options for participation
• Introduced YOUR WiLS e-newsletter covering the full range of WiLS services
• Created WiLS COOP blog for information sharing related to Cooperative Purchasing products and services
• Finalized a new Partnership Agreement with OCLC that re-invented the relationship
• Launched Digitization-on-Demand service for requested materials in UW-Madison Special Collections and Music
• Received a generous grant from the Nicholas Family Foundation to support the work of Wisconsin Heritage Online
• Developed new menu of services, conducted pilot projects and communicated with members to match their needs and interests with new WiLS programs
• Said good-bye to the true heart and soul of Wisconsin resource sharing as Mary Williamson retired

WiLS New Membership Structure

Following many individual interviews and long planning discussions we created a new three-tier membership structure and a new menu of services. Although pushed into action because of the new OCLC partnership that prohibited membership as a pre-requisite of receiving OCLC related services, the need for re-structuring had been on our horizon for some time. Basic membership was re-named Level 3, remaining the option for libraries wishing to use only the WiLS Cooperative Purchasing service. Libraries that use both Cooperative Purchasing and WiLS ILL became Level 2 members.

Service Level 1 was designed for libraries wishing to have all WiLS services available to them including the lowest possible fee for any WiLS workshop or conference. Rather than being tied to OCLC cataloging, this new membership option brings a range of research, consulting and specialized training all covered by the membership fee.
Highlights of 2008-09

New OCLC Partnership
After thirty plus years of serving as a Regional Service Provider for OCLC, the partnership was transformed in the spring following several years of study and negotiation. Under the new agreement WiLS is responsible for Billing, Order Assistance and Training related to WorldCat Resource Sharing. OCLC determines the extent of work to be performed and provides the compensation to support the work. There is no more WiLS surcharge.

As one of the harshest criticisms stated in our 2007 Membership Survey was “too much attention on marketing OCLC products” causing libraries to question whether WiLS real allegiance was to members or to OCLC, this will likely turn out to be the best new direction for WiLS in the long run. Of course, for the short term this was a significant change both for Wisconsin OCLC libraries and for the WiLS staff.

WHO Grant
The objective of the project funded by the Nicholas Family Foundation is to introduce and train Wisconsin cultural heritage institutions in digitization planning and methods so they can contribute their collections to the digital world via the statewide digital initiative, Wisconsin Heritage Online. The emphasis is on historical societies and museums. Total funding is $222,864 over two years, including funds for an outreach specialist. Emily Pfotenhauer was hired in June.

New Service Development
Based on input from members a variety of new services were developed, tested through pilot projects and ready for implementation by the end of the year. The foundation of the new services was “WiLS as an extension of your staff.” Workflow analysis, basic web design, project management, group facilitation, and enhancements to Cooperative Purchasing as well as a new emphasis on ILLiad training and support came together as the new direction for WiLS.

Cooperative Purchasing
Introduced WiLS COOP, a Blog designed around the most up-to-date information on Cooperative Purchasing including product trials and input from members.

New Menu of Services
Changing the relationship with OCLC allowed WiLS to revisit the many needs expressed by members in recent Years. The result was development of new services focused around the theme of “WiLS as an extension of your staff.” Ready for launch July 2009 — Technical Services Workflow Studies, Basic Web Design, Product Research and Enhanced Cooperative Purchasing.
## Financials

July 1, 2007-June 30, 2009

### FINANCIALS

<table>
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<tr>
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<tbody>
<tr>
<td>Membership Fees</td>
<td>$ 143,479</td>
<td>$ 148,015</td>
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<td>Contracts &amp; Projects</td>
<td>$ 164,811</td>
<td>$ 238,762</td>
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<td>Interest</td>
<td>$ 82,166</td>
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<td><strong>Service Fees:</strong></td>
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<tr>
<td>WiLS ILL related</td>
<td>$ 735,415</td>
<td>$ 661,297</td>
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<td>OCLC Related</td>
<td>$ 2,955,660</td>
<td>$ 3,028,300</td>
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<td>Coop</td>
<td>$ 6,531,545</td>
<td>$ 6,638,526</td>
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<td>AskAway</td>
<td>$ 110,229</td>
<td>$ 99,909</td>
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<tr>
<td>Wisc. Heritage Online</td>
<td>$ 58,826</td>
<td>$ 7,947</td>
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<tr>
<td><strong>GRAND TOTAL</strong></td>
<td>$10,782,131</td>
<td>$10,959,140</td>
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### EXPENSE

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<tbody>
<tr>
<td>Personnel</td>
<td>$ 1,337,805</td>
<td>$ 1,236,741</td>
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<td>Supplies/Services</td>
<td>$ 300,910</td>
<td>$ 297,446</td>
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<td>Furniture/Equip. Deprec</td>
<td>$ 17,741</td>
<td>$ 23,305</td>
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<tr>
<td>* Travel</td>
<td>$ 32,419</td>
<td>$ 38,489</td>
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<tr>
<td>Projects</td>
<td>$ 209,970</td>
<td>$ 235,358</td>
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<td><strong>SUB-TOTAL</strong></td>
<td>$ 1,898,845</td>
<td>$ 1,831,339</td>
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</table>

** Pass Through                         | $ 8,820,044         | $ 9,038,143         |

*** Project Development                 | $ 25,000            |                     |
| **GRAND TOTAL**                        | $10,743,889         | $10,869,482         |

| Income/Expense                         | $ 38,242            | $ 89,658            |

### FUND BALANCE

| Funds Reserved:                        |                     |                     |
| Close of Business                      | $ 100,000           |                     |
| Contingency                            | $ 41,101            |                     |
| Special Projects                       | $ 50,000            |                     |

**** Transition Fund                    | $ 304,896           |                     |

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* Includes both staff and non-staff travel

** Includes OCLC plus Cooperative Purchasing/Licensing

*** Participation in Open Source Resource Sharing Development Project

**** Set aside for layoff notification period
Member Demographics

<table>
<thead>
<tr>
<th># WiLS Members</th>
<th>Total Expenditures for WiLS Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>K-12 Schools/School Districts</td>
<td>236</td>
</tr>
<tr>
<td>Private Academic</td>
<td>29</td>
</tr>
<tr>
<td>Public Libraries/Library Systems</td>
<td>42*</td>
</tr>
<tr>
<td>Special Libraries</td>
<td>17</td>
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<tr>
<td>Technical College Libraries</td>
<td>16</td>
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<tr>
<td>Libraries of the UW System</td>
<td>38</td>
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</table>

* Most Public Library Systems have Group Membership in WiLS
Thus actual number of public libraries represented is: 321

WiLS ILL Activity

Interloan Requests Handled: 128,042
(compared with 109,323 in FY08)
Members 27,105 (FY08: 26,018)
DLTCL 10,765 (FY08: 10,492)
Minitex 2,917 (FY08: 3,303)
As UW Madison Lender 87,255 (FY08: 69,510)

Interloan Requests Filled: 90,085 (FY08: 74,316)
Member Fill Rate 79% (FY08: 82%)
DLTCL Fill Rate 86% (FY08: 94%)
Minitex Fill Rate 88% (FY08: 82%)
As UW Madison Lender 65% (FY08: 58%)
WiLS ILL Activity

**ILL Highlights**
Digitization on Demand provides complete digital copies of works from Memorial Library’s Special Collections and the Mills Music Library that are within public domain. Until now, these materials were only available to use in person. Works are scanned at their point of need and the digital copy of the work is moved to UW-Madison’s Digital Collection Center, then linked to the catalog and hosted at Google and the Hathi Trust to further extend access. The cost for this service is paid for entirely by the requestor. ([Cost details](#))

Created online presence on Facebook ([www.facebook.com/pages/Wisconsin-Library-Services](http://www.facebook.com/pages/Wisconsin-Library-Services)) and Twitter ([Twitter.com/WiLSill](http://Twitter.com/WiLSill))

ILLiad training and consultant service took root in 2008-2009, with in person and recorded training sessions to begin in 2010. “Best Practices” sessions are also planned via monthly webinars, covering topics such as: webpage design, routing rules, Billing Manager, etc. These webinars will be archived on the Midwest ILLiad user group ([midwestilliad.pbwiki.com](http://midwestilliad.pbwiki.com)) and the WiLS ([www.wils.wisc.edu](http://www.wils.wisc.edu)) websites. Other ‘on demand’ training sessions will be available (either in person or via webinars) for institutions that would like more information on specialized topics such as: post-implementation training, basic refresher sessions, new hire training, and advanced training for institutions that want to maximize their resource sharing services.

email [reshaw@wils.wisc.edu](mailto:reshaw@wils.wisc.edu)

Improved communication turning ACCESS from a quarterly to a monthly publication (to get on the mailing list,

Implemented several changes aimed at improved internal efficiency: internal policy/procedure wiki for student training, Odyssey helper, remote scanners, and nearly continuous re-aligning of physical space

Raised turn-around-time average to 90.4% of article requests and 85.4% of loan requests filled by 2nd day.

Completed full-scale internal cost analysis

ILL staff presented at the annual meetings of WLA, WAPL and WAAL.

Cooperative Purchasing and Licensing

**Cooperative Purchasing Highlights**
During the year the following vendors were added to the program: Greenwood Press (through their affiliation with ABC-CLIO), VerbaLearn (an SAT vocabulary prep product), Affordable Library Products (an order direct vendor), World Trade Press (specifically Global Road Warrior and A to Z Maps). We also expanded our Facts on File offerings and introduced a very popular new Gale database – Global Issues in Context. And as always, the search for new vendors and databases continues apace.

In January 2009 WiLS entered into an agreement with the South Central Library System to manage database subscriptions for their 52 member libraries. WiLS serves as the liaison between the individual libraries and vendors for new subscriptions, renewals and trials.
Cooperative Purchasing and Licensing

Total $5,674,633 Cooperative Purchasing by Vendor
OCLC Activity

OCLC Dollars Spent by Wisconsin Libraries

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<tr>
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<tbody>
<tr>
<td>Cataloging &amp; Metadata</td>
<td>$1,231,748</td>
<td>$1,153,499</td>
<td>$1,218,797</td>
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<tr>
<td>Resource Sharing</td>
<td>$662,234</td>
<td>$791,231</td>
<td>$827,879</td>
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<tr>
<td>Reference Services</td>
<td>$488,181</td>
<td>$624,436</td>
<td>$514,752</td>
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<tr>
<td>Digital Products</td>
<td>$71,381</td>
<td>$85,452</td>
<td>$123,401</td>
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<tr>
<td>Other</td>
<td>$333,774</td>
<td>$301,855</td>
<td>$280,586</td>
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<tr>
<td>TOTAL</td>
<td>$2,787,318</td>
<td>$2,956,476</td>
<td>$2,965,415</td>
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Notes: Resource Sharing includes ILLiad
Reference Services include FirstSearch databases, BadgerCat, WorldCat Collection Analysis
Does not include NetLibrary
WiLS Events

July 2008—June 2009

Conferences & User Meetings

<table>
<thead>
<tr>
<th>Date</th>
<th>Event Description</th>
<th>Attendees</th>
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</thead>
<tbody>
<tr>
<td>July 1st</td>
<td>Becoming a Change-Resilient Leader at Mequon</td>
<td>14</td>
</tr>
<tr>
<td>July 8th</td>
<td>WHO Digitization Series: Metadata for Digital Projects</td>
<td>13</td>
</tr>
<tr>
<td>October 1st</td>
<td>WiLS Annual ILL Meeting</td>
<td>76</td>
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<tr>
<td>October 7th</td>
<td>WiLS Peer Council Meeting</td>
<td>78</td>
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<tr>
<td>March 13th</td>
<td>Resource Future Directions, Madison</td>
<td>n/a</td>
</tr>
<tr>
<td>May 28th</td>
<td>Peer Council Meeting, Madison</td>
<td>75</td>
</tr>
<tr>
<td>July 28-29th</td>
<td>WiLSWorld 2009 Conference</td>
<td>159</td>
</tr>
</tbody>
</table>

WiLS Hours

August 14th—Coop for Public Libraries
September 11th—WorldCat Link Manager with Tony Melvyn, OCLC and David Sherwood, Nashotah House
October 9th—WorldCat Local and OCLC with Aaron King, representative of Better World Books
November 13th—Oral History Program with Troy Reeves
January 6th—What is Better World Books
February 5th—Koha in Wisconsin with Rick Hren, Carthage College; Vicki Teal Lovely, South Central Library System
March 3rd—A review of the new OCLC pricing
April 7th—Future Directions of WiLS
June 2nd—WiLS Billing Qs and As
June 16th—Tutor.com with with Tom Squillace

Open Source/Solutions Webinars

November 4th—Open Sources: Intro and Overview - Casey Bisson
November 11th—Open Sources: OPACs/ILSs
November 18th—Open Sources: Drupal in Libraries
December 2nd—Open Sources: Social Library and Its Tools - Tasha Saecker
December 9th—Open Sources: Plinkit and “Library web sites for all”
December 16th—Open Sources: Google Sites and Apps for non-profits
March 12th—Open Sources: SOPAC with John Blyberg
March 19th—Open Sources: Bitnami Sandboxes
March 26th—Open Sources: Wordpress CMS with Karen Coombs
April 2nd—Open Sources: Mobile Applications
April 9th—Open Sources: LibraryThing for Libraries
April 16th—Open Sources: LibX
WiLS Events

July 2008—June 2009

Online Sessions
7/17/08  AskAway Best Practices
8/21/08  AskAway Best Practices
9/18/08  AskAway Best Practices
10/23/08 AskAway Best Practices
11/20/08 AskAway Best Practices
12/18/08 AskAway Best Practices
1/15/09  AskAway Best Practices
2/19/09  AskAway Best Practices
3/19/09  AskAway Best Practices
4/16/09  AskAway Best Practices
5/21/09  AskAway Best Practices
6/18/09  AskAway Best Practices

5/12/08  Catalogers’ Clatsch: Qs and As
10/14/08 Catalogers’ Clatsch: Searching WorldCat
9/9/08   Catalogers’ Clatsch: Holdings Maintenance
8/12/08  Catalogers’ Clatsch: Quality Assurance
11/11/08 Catalogers’ Clatsch: Cataloging and Metadata Service
3/10/09  Catalogers’ Clatsch: MARC record

SITE VISITS

August 11, 2008 South Central, Tom Zillner
August 27, 2008 WI Department of Employee Trust Funds, Nichole Fromm
August 27, 2008 WI Department of Employee Trust Funds, Nichole Fromm
September 10, 2008 WI Department of Employee Trust Funds, Nichole Fromm
September 10, 2008 Wausau, Marathon County Public Library, Kathy Schneider and Kirsten Houtman
November 18, 2008 Green Bay, Kathy Schneider and Kirsten Houtman
November 24, 2008 UW-River Falls, Kathy Schneider and Kirsten Houtman
November 25, 2008 Hartland, Kathy Schneider and Kirsten Houtman
December 9, 2008 UW-Whitewater, Kathy Schneider
December 10, 2008 WI Department of Employee Trust Funds, Nichole Fromm
December 18, 2008 Marquette University, Kathy Schneider
December 18, 2008 Madison Public Library, Kathy Schneider and Jane Richard
January 27, 2009 Carthage College, Kathy Schneider and Kirsten Houtman
February 26, 2009 Milwaukee Area Technical College, Bob Shaw
March 11, 2009 Mequon for WHO, Kathy Schneider and Kirsten Houtman
March 23-26, 2009 UW-Milwaukee, Jane Richard and Nichole Fromm
April 14, 2009 Walworth, Nichole Fromm
April 15, 2009 Manitowoc Public Library, Kathy Schneider and Kirsten Houtman
May 19, 2009 Eastern Shores Library System, Nichole Fromm
WiLS Leadership

**WiLS Board (Board Meeting Minutes)**

Representing Private Colleges: Ane Carriveau (Ripon), Rita Magno—alternate (Viterbo), Carol Brill (Alverno)

Representing Public Libraries/Systems: Karen Grothe—Secretary (Chippewa Falls), David Weinhold—Treasurer (Eastern Shores Library System), Bernie Bellin—alternate (Lakeshores Library System)

Representing School Libraries: Carla Burmeister (Osseo-Fairchild), Kathy Boguszewski—Chair (Janesville), Suzanne Zellmann—alternate (Mequon-Thiensville)

Representing Special Libraries: Leslie Christensen (St Mary’s Hospital), Megan Eggers—alternate (American Girl Mattel)

Representing Technical Colleges: Ron Edwards (Western Wisconsin Technical College), Janet White—alternate (Blackhawk)

Representing UW System: Marc Rozmarynowski (Baraboo/Sauk County), Leanne Hansen—Chair Elect (Green Bay), Ed Van Gemert (Madison), Ewa Barczyk—alternate (Milwaukee)

Representing the DLTCL: Sally Drew

**Finance Committee**

David Weinhold, Eastern Shores Library System  
Ed Van Gemert, UW-Madison  
Peter Hamon, South Central  
Mareda Weiss, UW-Madison  
Tom Klement, WiLS—non-voting  
Kathy Schneider, WiLS—non-voting

**Peer Council Officers**

Chair: Joel Paulson, Beloit College  
Chair-elect: Deb McCabe, Portage County Public Library  
Secretary: Jenny Schroeder, UW-Madison, Ebling Library

**OCLC Members Council Delegates:** Patrick Wilkinson, UW-Oshkosh; Phyllis Christiansen, Marathon County Public Library

**Wisconsin Heritage Online Board**

Jim Lowery, UW-Milwaukee  
Joshua Ranger, UW-Oshkosh  
Linda Gruber, Milwaukee Public Museum  
Ewa Barczyk, UW-Milwaukee  
Cathy Markwiese, Milwaukee Public Library  
Peter Gilbert, Lawrence University  
Cristin J. Waterbury, Maritime Museum  
Louise Pfotenhauer, Neville Museum  
Mary Reider, Wisconsin Genealogical Society  
Rita Magno, Viterbo University  
Sally Drew, DLTCL  
Ed Van Gemert, UW-Madison  
Debbie Cardinal and Kathy Schneider, WiLS

**WiLS Representative to OCLC Collections and Technical Services Advisory Committee:** Irene Zimmerman, UW-Madison
Internal Organization— 23.3 FTE

RESOURCE SHARING (Total FTE: 14.40)
WiLS Assistant Director - Mary Williamson
ILL Managers - Joy Pohlman and Bob Shaw (shared position)
WIODD Coordinator (non-member lending) - Eric Robinson
Student Training; Union Listing - Joy Pohlman
ILL Automation Manager - Allen Wenzel
Reference & Bibliographic Problems - Fran Metcalf
Research Intern - Angela Milock
Searchers, Runners, Shippers*

WiLS OCLC (Total FTE: 3.29)
Program Assistant - Shirley Schenning
Resource Sharing - Mark Beatty
Marketing & Reference Products & BadgerCat - Kirsten Houtman
Cataloging - Jane Richard & Nichole Fromm

ADMINISTRATION/INTERNAL SUPPORT (Total FTE: 2.21)
Director - Kathy Schneider
Accountant - Tom Klement (contractor)
Technology Development & Support - Tom Zillner
Graphic & Web Designer - Sheila Zillner

COOPERATIVE PURCHASING/LICENSING (Total FTE: 2.50)
Program Manager - Cheryl Bradley
Consortial Licensing Associate - Sara Gold
Clerical Support - Renee Peterson*

CONSORTIAL SERVICES AND SPECIAL PROJECTS (Total FTE: .85)
Wisconsin Heritage Online - Debbie Cardinal and Kathy Schneider (.55)
AskAway/Virtual Reference - Mark Beatty (.3)

*=Student Positions