

WiLS ANNUAL REPORT

2014-2015

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INTRODUCTION

WiLS is a non-profit membership organization that facilitates collaborative projects and services to save members time and money and to advance library service, primarily in the state of Wisconsin. While most of WiLS' 523 members are libraries, we also work with cultural institutions, government agencies, and other non-profits to develop partnerships and projects.

This report of activities from July 2014 through June 2015 shares WiLS' mission, values, governance structure, strategic directions, services, finances, and our 2015-2016 strategic directions.

We welcome your [questions and feedback](#).

WiLS MISSION

We believe libraries, cultural institutions, and their partners make the world a better place.

We build relationships and provide services so they can do more with their time and money.

We help our members turn ideas into action.

WiLS ORGANIZATIONAL VALUES

We work in the best interest of our members.

We take their missions very seriously, and we only do work that supports them.

We are optimistic about the future of our members.

Our members have always overcome challenges, and they will continue to do so in the future. We encourage problem-solving through engagement and creativity among our community.

We are sincere.

We are genuinely honest with ourselves and others. We are reflective about who we are as an organization and how we can improve service to our members.

We promote innovation.

We guide the efforts and broadcast the outcomes of members' experimental endeavors, and we model innovation through our own organizational practices.

We respect and value our members' time as we do our own.

We strive to find ways to work smarter and more efficiently for our members.

We believe that we're all in this together.

We are a part of the ecosystem that supports the community of our members. We benefit from the community and the community benefits from us. We believe that we succeed together.

WiLS GOVERNANCE

WiLS is governed by a [thirteen-member board](#) of representatives from WiLS members. Representatives are chosen by represented consortia or by the general membership, depending on the seat. Board members serve three year terms.

The WiLS Board is advised by an eight person [Finance Committee](#), made up of members of the board, WiLS staff, and citizen members.

WiLS members also have the opportunity to participate on workgroups and committees. The Cooperative Purchasing Advisory Committee (CooPAC) provides guidance for one of our major service areas. Workgroups are formed to help with various events and with other short-term projects.

WiLS STRATEGIC DIRECTIONS: 2014-2015

Based on guidance from membership, staff, and the board, WiLS established the following strategic directions for 2014-2015:

Improve cooperative purchasing processes

Make the purchasing experience better for our members and less labor intensive for us.

In 2014, we introduced the MyWiLS portal that allows members to manage their own subscriptions and contact information, which has dramatically improved the cooperative purchasing processes for WiLS staff and members.

Develop Experts Connection

Expand and solidify the Experts Connection service and find new and inventive ways for our members to coordinate on funding collaborative projects.

The Experts Connection service continued to evolve in 2014/15 and a workgroup was formed to develop a more formalized structure.

Improve time management and allocation mechanisms

Focus internally on best practices to manage our time and build a strong foundation of organizational practices to allow us to expand services while keeping our overhead low.

We continue to evolve how we work as a virtual organization. 2014/15 saw the introduction of new tools to assist with time management, including Smartsheet (a collaborative to-do management system) and a project planning template.

WiLS SERVICES

WiLS supports its mission to serve members through four core services: Cooperative Purchasing and Projects, Consortium Management, Consulting, and Events and Education. Each section below explains the service, highlights examples of that service from the last year, and gives examples of other projects and initiatives WiLS has undertaken or is undertaking in that area.



COOPERATIVE PURCHASING AND PROJECTS

WiLS' cooperative services bring together groups with common goals to accomplish their work more efficiently and with broader impact. WiLS saves libraries time and money by managing the complete life cycle for electronic content purchases through its [Cooperative Purchasing Service](#).

WiLS' Cooperative Purchasing Service has coordinated groups of members to purchase electronic resources from our vendor partners for decades, resulting in significant cost savings. In 2014/15, 411 members purchased 2,884 subscriptions through WiLS. While it is difficult to know how much our members saved overall because list pricing is not readily available, the saving from Oxford University Press is an example of what cooperative purchasing does for our members. In 2015, 46 libraries saved over \$81,000 by purchasing their Oxford products through WiLS - over 30% off of list price when taken in aggregate.

WiLS saves members significant staff time in addition to cost savings. Many of our K12 members cite this time savings as a primary reason they participate in the program. The South Central Library System, 53 libraries spanning 7 counties, relies on WiLS to manage the electronic resource subscriptions for each library. With 17 vendors and over 20 unique group subscriptions, the libraries and system are able to request trials and pricing, obtain group discounts, and receive one invoice for multiple vendors.

This year, we also launched [MyWiLS](#), an online portal for members to view and renew subscriptions, as well as change contact information. MyWiLS grew out of members requesting an easier way to renew or order subscriptions, and we leveraged our existing Customer Management Software, Sugar, to meet that need. We hired a developer, wrote the specifications, beta tested the results with members, and rolled it out to Cooperative Purchasing members. The feedback from members was very positive; MyWiLS is saving them time and reducing frustration. We've tweaked the platform and documentation according to input from the community and continue to invest in developing the product to improve the user experience.

WiLS grew participation in the Cooperative Purchasing Service from both members and vendors in 2014-2015:

	New	Total
Members	19	411
Subscriptions	309	2884
Vendor Partners	7	112
Databases	71	699

WiLS also manages other cooperative efforts, including collaborative projects. Besides the relationships that can be built and the positive service impact, successful collaborations make projects more

affordable and efficient. In our role as a statewide organization, we often hear of projects that we know others are considering. We are able to connect them and help coordinate their efforts.

WiLS' Cooperative Projects in 2015 included a partnership with UW-Madison and libraries around the state to educate Wisconsin residents about [climate change through a series of Massively Open Online Courses \(MOOCs\)](#). WiLS' coordination made it easier for UW-Madison to partner with libraries, made the process more efficient by coordinating efforts among the libraries, and provided members with high quality educational programming.



CONSORTIUM MANAGEMENT

Part of WiLS' mission is to build relationships so our members can do more with their time and money. One way we achieve this goal is through consortium management. While forming a consortium is a great way for libraries and organizations to partner to provide ongoing services and resources to their members and communities, the reality of needing to manage the day-to-day business and operations of the consortium can be overwhelming. Often, the partners involved in a consortium don't have the staff time to provide these services, and this is where we can help.

Since 2005, [Recollection Wisconsin](#) (formerly Wisconsin Heritage Online) has partnered with libraries, archives, historical societies and museums across the state to help them digitize and share unique local content online. As Project Manager for this collaborative initiative, WiLS coordinates the program's governing board, committees and work groups, facilitates communication among partners and stakeholders, maintains policy and procedures documents, and coordinates outreach activities. As Fiscal Agent, WiLS manages the program budget and develops grant applications to secure additional funding. This year, WiLS spearheaded Recollection Wisconsin's expansion into a Service Hub for the [Digital Public Library of America \(DPLA\)](#), elevating the collective and its assets to a national stage.

In addition to Recollection Wisconsin, WiLS also manages the [Wisconsin Public Library Consortium](#) (WPLC); [Infopass](#), a Milwaukee area resource sharing initiative; and the Horticulture Library Consortium, a group of horticulture institutions with a shared ebook collection.



CONSULTING

A key piece of our mission is that we help our members turn ideas into action, and one way we do this is through our consulting services. Typically, a member will contact us and ask for some help with a project. We work with the member to get a clear understanding of what they are trying to accomplish. Then, we work with the library to develop processes and a plan to do the project. We are involved in the project as much as the member wants us to be, providing project management and expertise as needed. If WiLS doesn't have the knowledge on staff to effectively carry out the work, we enlist experts from within our library community to provide the best possible outcome.

WiLS provided consulting services to a number of members this year, specifically in the areas of strategic planning and library service assessment and improvement.

Strategic Planning

WiLS provided strategic planning services for a number of public libraries and public library systems. We helped develop budget-appropriate processes that resulted in strategic plans and pathways to implementing them. We assisted with gathering and analyzing data and community input for future

service directions, coordinating with diverse stakeholders, and developing community engagement strategies, among many other services based on the library's or system's planning need.

One example of this service was a cohort planning process involving four public library systems: Milwaukee County Federated Library System, Nicolet Federated Library System, Waukesha County Federated Library System (now Bridges), and Winding Rivers Library System. Each system undertook a similar process for planning around the same time, allowing them to share experiences and information and learn from one another.

Library Service Assessment and Improvement

Another area in which WiLS supported members in 2014-2015 was by helping libraries assess their current services and offering suggestions for improvement. Some examples of this service we provided are:

- Performing a process management study for the La Crosse Public Library.
- Working with the Southwest Wisconsin Library System and CESA-3 to develop a combined delivery service for the two organizations that resulted in their members receiving an additional day of delivery and the two organizations saving a combined \$20,000 in annual operating expenses.
- Assisting the Kenosha Public Library in rethinking their technical services unit by identifying two experts to visit and coordinating the development of a recommendations report.



EVENTS AND EDUCATION

In support of our mission to serve members, and to drive the library field forward, WiLS hosts professional development events to connect and educate members of the community, build relationships, foster collaboration, solve problems, and introduce and build upon innovative ideas impacting members. WiLS draws on a variety of expertise to plan and produce these events. Planning workgroups are made up of WiLS members, and meeting or session topics are driven by member input whenever possible. Programs and workshops are led by experts from WiLS staff, the member community, and professionals from business, education, and the broader library world.

This year, our members in the southwest part of the state expressed to us the need to learn more about the building process. In response, WiLS hosted [Updating Library Spaces: A Learning Day](#) to connect librarians, board members, trustees, architects from Engberg Anderson, and builders to learn about Viroqua Public Library's building project and Soldiers Grove Public Library's renovation, and to tour each site. Together, this group shared their ideas, experiences, and expertise in the processes of budgeting, fundraising, planning, community input gathering, and library design.

In 2014-2015, we hosted our regular yearly events: [WiLSWorld](#) in the summer, six [Regional Community Meetings](#) in the fall, the [Annual ILL Meeting](#) in early spring, and [Peer Council](#) in late spring. WiLS also co-hosted the 2014 Upper Midwest Digital Collections Conference with MINITEX, working with OCLC as a sponsor. WiLS staff also participated in and presented at a number of other educational and library-related events through the year.

WiLS ANNUAL FINANCIAL REPORT: 2014-2015

REVENUE

Cooperative purchasing sales	\$8,524,578.98
Cooperative purchasing member fees	\$74,297.00
Interest/Amex reimbursement	\$87,313.10
Event revenue	\$34,412.50
Other project income	\$247,810.79
Total	\$8,968,412.37

EXPENSES

Cooperative purchasing materials	\$8,201,998.11
Staff	\$489,066.28
Event expenses	\$22,109.93
Project expenses	\$100,148.80
Other expenses	\$82,555.83
Total	\$8,895,878.95

NET INCOME **\$72,533.42**

LOOKING FORWARD

Each year, WiLS undertakes a member-focused planning process to identify strategic directions for the upcoming year. The following strategic directions have been identified for 2015-2016, and work on them is underway now:

Develop a new plan for WiLS events/educational opportunities

With the help of a workgroup made up of staff and board members, we will review our current events and educational opportunities (including Peer Council, ILL Meeting, WiLSWorld and regional meetings) and consider how we alter that plan to better meet members' educational needs and to provide more information and education around the services we provide.

Explore adding a position with expertise in academic libraries for planning/consulting services

A recent survey of academic members indicated interest in planning and consulting services, though the survey was not detailed enough to give us a clear picture of the need. With input from our academic board members, we will create a process to learn more about the needs and aspirations of our academic community and how WiLS might fit into this picture. The outcome of this process may be an additional position with expertise in academic libraries to assist with consulting services.

Research and develop a plan for collecting and sharing member information

Our members have valuable experience that we would like to effectively collect and share. This strategic direction will result in a plan for better and more systematic mechanisms to collect the experiences of our members, particularly with new products, electronic resources, and experimental services, and to share that knowledge with the WiLS community.

STAY IN TOUCH!

We welcome the opportunity to hear what you're doing, share what we're doing, and pass along information from the community that serves your efforts. You can stay in touch with WiLS through these various channels:

- [Subscribe to our weekly newsletter](#), This Week at WiLS, to hear updates on our work and from the community, and musings on the world at large. Or, you can read the [archives](#).
- [Subscribe to our monthly Cooperative Purchasing Newsletter](#), which shares product trials and promotions, updates from vendors, information about our new vendor partners, and more.
- Check out our [website and blog](#) for all things WiLS.
- Follow us on [Facebook](#) and [Twitter](#) (@wilscommunity).
- [Contact us](#) directly.

WiLS deeply appreciates the hard work and input of its staff, board, committees, and members.

Thank you for being part of our community!