

# Statewide Intersystem Delivery Service and WPLC Proposal from DPI - Prepared by Bruce Smith

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## Overview

In 2016, when the PLSR Delivery Workgroup developed its statewide intersystem delivery hub connection model, ongoing service impacts caused by disruptions during the pandemic could not have been foreseen. However, throughout these experiences, system staff responsible for coordinating their system's delivery service have been meeting regularly as a statewide group, and occasionally in smaller regional groups, to discuss, test, and evaluate statewide intersystem delivery connections to continue to improve and strengthen the statewide delivery network. Also during this time, Corey Baumann, SCLS Delivery Services Coordinator, and Bruce Smith, DPI Library Services Team Project Coordinator, have been regularly meeting to coordinate intersystem service improvement projects and explore other potential intersystem network improvements. This proposal is based on information gathered from systems and results from service improvements piloted the last couple of years.

## WPLC Collaboration Support

DPI recommends the WPLC Board consider adopting statewide intersystem delivery as an ongoing WPLC service. WPLC can strengthen the long-term stability and sustainability of the Wisconsin libraries statewide intersystem delivery network in two ways.

- Establish a statewide delivery workgroup made up of staff that are responsible for coordinating each system's delivery service.
- Provide statewide delivery service fiscal oversight by the WPLC Board.

## System Delivery Service Workgroup

The regular communication and coordination among system staff responsible for coordinating their system's delivery service has proven to be highly valuable and needed the last couple of years. A WPLC workgroup could ensure the continuity of collaborative intersystem delivery activities, expand institutional knowledge of statewide delivery service, and enhance ideation for future service improvement opportunities. These activities include:

- Coordinating communication and oversight of daily statewide service between systems, both within different regions and statewide
- Continuous service improvement efforts, including:
  - Collecting delivery volume and cost data to be used for service analysis
  - Exploring statewide hub connection route service improvement opportunities
  - Developing intersystem bin tracking systems
  - Developing a connection to Illinois like exists with Minitex

- Exploring innovation improvements such as automated materials handling at sorting hubs and electric vehicle options/uses
- Sharing best delivery practices, tools, and templates
- Cooperatively work with and purchase from vendors when feasible

## WPLC Project Management Needs

The ongoing collaborative efforts of system delivery coordinators, working with their delivery partners (system contracted private couriers, other library types - i.e. UW System) would greatly benefit from support through WPLC. Workgroup support needs would include:

- Project manager time to initially set up the group with communication tools (listserv or other) and collaboration tools, including a central document repository to maintain and provide access by all workgroup members to service planning documents, delivery volume sample data workbooks, procedural and best practice documentation, and more.
- This workgroup could self-lead its meetings, at a frequency to be determined but monthly is suggested to start, or have meeting coordination support (scheduling, agenda setting, notes, documentation) from the project managers. The workgroup, with guidance from the project managers, could determine how they want to establish workgroup leadership and define the responsibilities of that role.
- The workgroup members would be responsible for:
  - Communication and coordination of planning and implementing activities to improve statewide delivery service. The workgroup will be provided with service information and options that has been gathered and developed the last few years as a resource for exploring continuous service improvement opportunities.
  - Ongoing statewide delivery service cost analysis, improved cost-sharing model development, and annual cooperative budget development.

## WPLC Board Fiscal Oversight

The statewide intersystem delivery network is an existing statewide service that is cooperatively and fully-funded (approximately \$1.1 million) by all systems and other library participants of the network, most significantly the UW system. About 30 years ago when there were 17 systems, a cost sharing model for the systems' share of intersystem delivery service costs, as provided by SCLS, was developed and approved by SRLAAW. This was done within SRLAAW at the time as the only body that existed that included all the systems. SRLAAW does not have any explicit approval authority over statewide intersystem delivery. SCLS continues to provide SRLAAW with occasional intersystem service updates, including informing systems of annual intersystem delivery fee amounts.

There has been a lot of change with intersystem delivery in the last 30 years since SRLAAW adopted the formula to split up the systems' share of statewide delivery costs. The result is a current statewide intersystem delivery service budget and cost sharing model that is in need of review and updating in a way that provides flexibility and transparency as improvements to statewide routes and hub connections continue to be explored and implemented.

The following is a working draft of a budget framework to provide a snapshot of the various cost components of statewide delivery service and how service participant fees are allocated across different groups. The workgroup will be provided with detailed breakdowns of both costs and participant fee allocations as a resource for their work to develop a transparent framework that can be used to cooperatively determine statewide delivery service costs and fees.

<b>2024 Statewide Delivery Service - WORKING DRAFT</b>	
<b>Service</b> (route costs include sorting, except UW Madison, and all vehicle costs)	<b>Annual Cost</b>
SCLS - Northeast WI Route	\$171,968
SCLS - Southeast WI Route	\$165,342
SCLS - Western WI Route	\$204,146
SCLS - UW Madison Campus Libraries Routes	\$40,577
SCLS - Route connection service to SWLS	\$23,634
SCLS - Service to UW Campuses within SCLS outside of Madison	\$17,850
Waltco - Contracted route service to Northern Locations	\$76,500
MLS - Route service to UW-Washington County	\$3,998
SWLS - Route service to SWLS HQ and UW-Platteville	\$9,149
WRLS - Route service to UW-La Crosse and Viterbo University	\$6,087
SCLS - Service Coordination and Management	\$108,316
SCLS - Equipment & Supplies	\$2,000
SCLS - Facility	\$60,700
SCLS - Fiscal Agent	\$10,000
SCLS - Other Support (i.e. time off coverage, worker's compensation)	\$175,888
<b>TOTAL COSTS</b>	<b>\$1,076,155</b>
<b>Statewide Delivery Service Participants</b>	<b>Annual Fee</b>
UW System	\$755,341
Public Library Systems	\$247,384
Private and Technical Universities and Colleges	\$66,497
Government Agencies and Institutions	\$6,933
<b>TOTAL FEES</b>	<b>\$1,076,155</b>

### Statewide Intersystem Delivery Service Budget Development and Approval

The Statewide Delivery Service workgroup, with input from other key statewide delivery service stakeholders such as the UW System, would be responsible for the following to propose to the WPLC Board for approval in alignment with the Board's budget approval process and timeline.

- Developing an annual statewide delivery service budget including:
  - Service provider costs for the different components of the statewide intersystem delivery route, sorting, and coordination services, both system provided and contracted.

- Service investment cost proposals, for system and/or LSTA funding (DPI can assign a staff liaison to the workgroup), for improvements, including implementing statewide delivery hub and route model changes or implementing service tools and innovations to improve efficiency and effectiveness.
- Determining statewide delivery service annual participant fee amounts, according to any board approved cost-sharing models developed by the workgroup to determine each participant's share of statewide delivery service costs.

### Service Fiscal Agent

SCLS is currently established and funded through participant fees as the statewide intersystem delivery service provider. This includes providing fiscal agent support to manage service expense accounting and participant invoicing, in addition to SCLS operationally coordinating statewide service through its system-run statewide routes and vendor contracts. Thus, according to the WPLC bylaws that a system can be a fiscal agent for a WPLC service collaboration, SCLS could maintain this role, including the SCLS Delivery Service Coordinator leading the workgroup developing a statewide delivery service budget and cost sharing model.

### WPLC Project Management Needs

The role of the WPLC project manager would be to communicate and coordinate with system delivery coordinator workgroup leadership to align their budget development timeline with the WPLC Board's budget process and timeline. This would include connecting workgroup leadership into board agendas as needed to provide service and budget development updates and present annual service costs and participant fees for consideration and approval.

### Conclusion

The statewide libraries delivery network consists of both the intersystem delivery routes that connect systems and other library types to each other across the state and the 15 system delivery services, in-house and contracted, that each system provides within its borders to member libraries and also to non-member libraries in many systems. The result is a statewide intersystem delivery network service that is currently cooperatively funded and provided by all Wisconsin public library systems. This positions WPLC, with its governance structure and bylaws, as the logical home for cooperative service and fiscal oversight of statewide intersystem delivery as an ongoing WPLC service.