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"The enterprise that does not innovate ages and declines. And in a period of rapid change such as the present, the decline will be fast."

– Peter Drucker

With the advice and support of our member libraries, WiLS moved in bold new directions, while remaining focused on our core mission to help libraries adapt to the changing nature of information technology. We built a broad range of support, research and consulting services; “WiLS as an extension of your staff” became our new mantra. We also initiated a Community Manager program - visiting libraries across the state to share information, listen to library needs and offer assistance. We truly appreciate these meetings to understand individual libraries, and to generate ideas that will further cultivate our transformation.

Watch the WiLS promotional video for a review of services and memberships.
Interlibrary Loan and Reference

WiLS Borrowing Service
WiLS began this new service as many staff retire around the country. In an effort to help libraries maintain their ILL borrowing services at a reduced cost, we work remotely to fill requests, to work with patrons on problems, and to decrease request turn around time.

ILL Training
This was a banner year for training support that we provided to ILL staff in public, academic, and special libraries around the state. Every month saw our staff traveling to libraries to help analyze workflows of ILL departments, making recommendations for change, and helping the staff implement changes to improve their departments.

ILLiad Database Archiving
This year many of the ILLiad software users made use of a new service to help provide a database backup service for their ILL data. This service came about because the parent company of ILLiad has been unable to provide this necessary service to its users.

1st Ever Joint WiLS and RL&LL ILL conference
In an effort to bring two separate conferences in the fall together for discussions on ILL topics, WiLS and Resources for Libraries and Lifelong Learning joined efforts to provide a single ILL conference.

New ILL Staff
Angela Milock joined the WiLS ILL staff during the year. As an intern to WiLS ILL in the year past, Angela was a welcome addition because of her endless energy and drive to improve our member’s service options.

WiLS ILL Statistics

<table>
<thead>
<tr>
<th></th>
<th>FY 09/10</th>
<th>FY08/09</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interloan Requests handled:</td>
<td>120,102</td>
<td>128,042</td>
</tr>
<tr>
<td>Members:</td>
<td>7,133</td>
<td>27,105</td>
</tr>
<tr>
<td>RL&amp;LL:</td>
<td>9,839</td>
<td>10,765</td>
</tr>
<tr>
<td>Minitex:</td>
<td>2,714</td>
<td>2,917</td>
</tr>
<tr>
<td>As UW Madison Lender:</td>
<td>100,416</td>
<td>87,255</td>
</tr>
<tr>
<td>Interloan Requests Filled:</td>
<td>83,292</td>
<td>90,085</td>
</tr>
<tr>
<td>Member Fill Rate:</td>
<td>80%</td>
<td>79%</td>
</tr>
<tr>
<td>RL&amp;LL Fill Rate:</td>
<td>88%</td>
<td>86%</td>
</tr>
<tr>
<td>Minitex Fill Rate:</td>
<td>88%</td>
<td>88%</td>
</tr>
<tr>
<td>As UW Madison Lender:</td>
<td>61%</td>
<td>65%</td>
</tr>
</tbody>
</table>
**Member Accounts**
Libraries have long valued WiLS as a trusted partner to handle financial transactions with vendors.

Through a contract with OCLC, WiLS acts as the billing agent for about 125 libraries, handing their access fees, cataloging and inter-library loan subscriptions, and related charges, as well as miscellaneous charges for products like WebDewey and paper documentation. Last year, we monitored $2,627,792 in OCLC payments. These ranged from applying a $0.25 holdings deletion credit to processing the $66,000 bill for the state-wide AskAway contract.

In the cooperative purchasing service, WiLS not only handles payments, we even negotiate with the vendors on behalf of libraries to get the best price for the most desirable electronic databases. This service is available with any WiLS membership, but it is the main focus of our 280 Level 3 libraries. Overall expenditures topped $5,822,000 in fiscal year 2009!

**Cooperative Purchasing**
A huge change for Cooperative Purchasing was the upcoming retirement of Cheryl Bradley. Cheryl started the WiLS Cooperative Purchasing Program more than twenty years ago and played a huge role in taking it to the place it is today.

With Cheryl's impending departure, Kirsten Houtman began working with academic libraries for the Coop Program, She joins Sara Gold, who works with public and k12 libraries.

During the year the following vendors and databases were added to the program: Bridgeman Education, Cambridge, Consumer Reports, The Chronicle of Higher Education, Curriculum Video on Demand, EasyBib, EBL (Ebook Library), Films on Demand, Hoover's (Dunn & Bradstreet), NBC Learn, Ship Index, Sociometrics, Springer and SRDS, and Tumblebooks. We continue to welcome new vendors.

**Benefits of Cooperative Purchasing:**
Access to over 3500 databases with average savings of 15-20% on subscriptions for members

Group purchasing power with no fuss...WiLS negotiates with vendors on behalf of member libraries to buy more for less

Participate in a database subscription management service offering customized database trials and group subscription opportunities with no hidden fees
Cooperative Purchasing Activities

<table>
<thead>
<tr>
<th>Vendor</th>
<th>Purchases</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proquest</td>
<td>$1,475,945</td>
</tr>
<tr>
<td>Ebsco</td>
<td>$1,193,319</td>
</tr>
<tr>
<td>Other Coop</td>
<td>$ 513,690</td>
</tr>
<tr>
<td>Gale Publications</td>
<td>$ 487,220</td>
</tr>
<tr>
<td>LexisNexis</td>
<td>$ 478,642</td>
</tr>
<tr>
<td>Project Muse</td>
<td>$ 245,213</td>
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<tr>
<td>FactsonFile</td>
<td>$ 227,195</td>
</tr>
<tr>
<td>Oxford Univ Press</td>
<td>$ 160,498</td>
</tr>
<tr>
<td>BioOne</td>
<td>$ 104,629</td>
</tr>
<tr>
<td>Wilson</td>
<td>$  88,715</td>
</tr>
<tr>
<td>ABC-CLIO</td>
<td>$  66,267</td>
</tr>
<tr>
<td>CQ</td>
<td>$  59,013</td>
</tr>
<tr>
<td>Elsevier</td>
<td>$  55,482</td>
</tr>
<tr>
<td>Rosen Publishing</td>
<td>$  42,238</td>
</tr>
<tr>
<td>Baker &amp; Taylor</td>
<td>$  34,090</td>
</tr>
<tr>
<td>Britannica</td>
<td>$  33,059</td>
</tr>
<tr>
<td>Books24x7</td>
<td>$  30,333</td>
</tr>
<tr>
<td>ebrary</td>
<td>$   25,251</td>
</tr>
<tr>
<td>Accunet</td>
<td>$   23,333</td>
</tr>
<tr>
<td>Bowker</td>
<td>$   22,775</td>
</tr>
<tr>
<td>McGraw-Hill</td>
<td>$   16,844</td>
</tr>
<tr>
<td>OVID</td>
<td>$    14,596</td>
</tr>
<tr>
<td>Tattle Tape</td>
<td>$   11,853</td>
</tr>
<tr>
<td>Inspiration</td>
<td>$   11,709</td>
</tr>
<tr>
<td>Alexander Street</td>
<td>$   10,475</td>
</tr>
<tr>
<td>CountryWatch.com</td>
<td>$     8,720</td>
</tr>
<tr>
<td>Thompson Scientific</td>
<td>$     5,987</td>
</tr>
<tr>
<td>Bernan</td>
<td>$     4,095</td>
</tr>
<tr>
<td>Barcode Discount Warehouse</td>
<td>$     1,652</td>
</tr>
<tr>
<td>Computype</td>
<td>$       357</td>
</tr>
</tbody>
</table>

Total Vendor Purchases $5,821,676.26
Wisconsin's Partnerships

**OCLC**
Under agreement, WiLS is responsible for OCLC billing, order assistance and training related to WorldCat Resource Sharing. See other parts of this report for details about these responsibilities.

**Wisconsin Public Library Consortium**
In May 2010, WiLS took over the project management of the Wisconsin Public Library Consortium (WPLC). Primarily this consists of overseeing the shared collection of audio and ebooks, by monitoring communications (lists, website), patron support, and coordinating collection development.

**Wisconsin Heritage Online**
While continuing the work funded through the Nicholas Family Foundation, the key topic for the year was the future of this project. The WHO Board discussed a number of options coming to the conclusion that the project could not be sustained through member fees and the subsidy from WiLS will cease when the Foundation funding ends. Initially it was thought that WHO could be transitioned to the Reference and Loan Library with the help of LSTA funding. That proposal failed to gain the support of the LSTA Advisory Committee and as the year drew to a close, the search for an organizational home for WHO continued.
Projects 2009-2010

Level 1 Community Manager Program
Projects as a result of site visits:

**Custom Research/Tech Notes**
- Learning Commons research
- All Atwitter Tech Note

**Technical Services Workflow Studies**
- Carroll University
- Manitowoc Public Library
- UW-Oshkosh
- Rhinelander District Library
- Nicolet College
- Fond du Lac Public Library
- UW-Green Bay
- Viterbo University
- Milwaukee Institute of Art and Design

**Website Assistance**
- Eastern Shores public libraries
- Wisconsin Valley public libraries

**Collection Maintenance**
- Weeding at Kohler Public Library (pilot)

**ILL Workflow/Process Reviews**
- UW-Milwaukee
- Beloit College
- Carthage College
- Kenosha Public Library
- UW-Oshkosh

**ILLiad Support & Training**
- UW Colleges
- Viterbo University
- UW-Platteville
- UW-Oshkosh
- UW-La Crosse

**ILL Borrowing agent**
- UW Colleges (pilot)

**Enhanced Cooperative Purchasing**
- South Central Library System (pilot)

**Database Statistics**
- CUWL Shared Electronic Collection
# Operation Financials

<table>
<thead>
<tr>
<th></th>
<th>FY 2009-2010</th>
<th>FY 2008-2009</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Income</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Membership Fees</td>
<td>$220,490</td>
<td>$141,629</td>
</tr>
<tr>
<td>Contracts &amp; Projects</td>
<td>$600,228</td>
<td>$273,036</td>
</tr>
<tr>
<td>Interest</td>
<td>$ 68,730</td>
<td>$ 82,166</td>
</tr>
<tr>
<td><strong>Services</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>WiLS ILL Related</td>
<td>$ 688,015</td>
<td>$ 735,415</td>
</tr>
<tr>
<td>OCLC Related</td>
<td>$ 2,627,792</td>
<td>$ 3,071,101</td>
</tr>
<tr>
<td>Cooperative Purchasing</td>
<td>$ 6,213,316</td>
<td>$ 6,512,272</td>
</tr>
<tr>
<td>Discount and Credits</td>
<td>$( 26,413)</td>
<td>$( 33,488)</td>
</tr>
<tr>
<td><strong>GRAND TOTAL</strong></td>
<td>$10,392,158</td>
<td>$10,782,131</td>
</tr>
</tbody>
</table>

| **EXPENSE**          |              |              |
| Personnel            | $1,289,363   | $1,337,805   |
| Supplies & Services  | $ 254,856    | $ 300,910    |
| Furniture & Equipment| $( 9,060)    | $( 17,741)   |
| Travel*              | $( 30,800)   | $( 32,419)   |
| Project Development  | —            | $ 25,000 (Open Source Resource Project) |
| Contracts & Projects | $ 373,707    | $ 209,970    |
| **PASS THROUGH**     | $ 8,518,058  | $ 8,820,044  |
| **GRAND TOTAL**      | $10,475,844  | $10,743,889  |

| Income/Expense       | $(83,686)    | $38,242      |

| **FUND BALANCE**     | FY2009-2010  | FY2008-2009  |
| Close of Business    | $100,000     |              |
| Contingency          | $ 41,101     |              |
| Special Projects     | $ 50,00      |              |
| Transition Fund      | $304,896*    |              |

* Set aside for layoff notification period

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* includes both staff and non-staff travel
** includes OCLC plus Cooperative Purchasing
366 LIBRARIES ARE MEMBERS OF WILS. MEMBERSHIP HAS A THREE-TIERED STRUCTURE.

66 Level 1 members:
- 23 Private academic libraries
- 9 Special libraries
- 9 UW libraries
- 8 Public library systems (serving individual libraries)
- 7 UW-Madison specialized libraries
- 6 Technical Colleges
- 2 Public libraries
- 2 School districts

20 Level 2 members:
- 6 Special libraries
- 5 UW libraries
- 4 Private academic libraries
- 4 Technical Colleges
- 1 School district

280 Level 3 members:
- 244 School districts
- 10 Special libraries
- 9 Public libraries
- 8 Technical colleges
- 5 Private academic libraries
- 3 Public library systems
- 1 Cultural heritage institution
Member Response

Testimonials

- This year at WiLSWorld, our member breakfast highlighted the new services that came out of the Level 1 Community Manager program. Here is what our members had to say:

- “Overall, we can’t be happier with the way WiLS has partnered with us on this project. Their expertise has been invaluable, and they saved us numerous hours in putting together a set of solutions for us. Given that time is often our most precious commodity, the value is incalculable.” – Gretel Stock-Kupperman, Viterbo University

- “Since my staff is small and their time in limited, weeding was a job often pushed aside. This opportunity to have the WiLS staff help me with a major weed was so exciting!” – Erin Coppers, Kohler Public Library

- “Explaining in detail to an outside source really has helped us take a closer look at what we are doing and has encouraged a good dialogue among the ILL Staff.” – Ewa Barczyk, UW-Milwaukee

Gathering Member Input

In April, WiLS Level 1 member libraries were queried on new services that were implemented or tested over the past year or to be considered. Each piece of the pie represents interest and participation by our Level 1 members in the new services. Getting the most votes were: enhanced cooperative purchasing, database statistics, collection maintenance services, and product research on demand.
Events

Conferences & User Meetings
July 21-22, 2010 WiLSWorld Conference
May 18, 2010 Peer Council Meeting, Madison
October 29-30, 2009 Upper Midwest CONTENTdm User Group
October 6, 2009 WiLS and R&L Annual ILL Meeting

Open Solutions Online Series
4/22 - Cool tools: Prezi and Zotero
4/15 - Mobile Site Generator
4/8 - Information, Not Location: MLibrary
4/1 - OCLC Web Services in Action
3/18 - Library H3lp
3/11 - Get Real, Be Creative: Social Networking in Libraries

NISO Series Online
June 9th: Control Your Vocabulary: Real-World Applications of Semantic Technology
May 12th: It's in the Mail—Best Practices for Resource Sharing
April 14th: RFID in Libraries—Standards and Expanding Use
Events and Outreach

WorldCat Resource Sharing Basics
4 online and 1 on-site workshops

WorldCat Resource Sharing Tricks
10 online and 1 on-site workshops

Final Catalogers Clatsch Webinar
OCLC Training Portal with Jane Richard (slide pdf)

AskAway Best Practices
8 online sessions

WiLS Hours
Oh, The Places You’ll Go! with an ERMS (Electronic Resource Management System) (recording)
ILLiad 8.0 Starter Kit (recording)
WLA recap: Workflow Analysis; Collection Development and Resource Sharing; Drupal in Your Library
Community Managers' Panel
WorldCat Local Quick Start with Mark Beatty
Business or Pleasure? Practical Social Networking for Professionals with Andrew Burkhardt

Related links available on WiLS Website:
Current calendar
Newsletter Archive
Site Visits

Northwest
Northland International
UW-Superior
UW-Stevens Point
CDC/CRS Stevens Point
Ashland University
Marshfield Clinic

Southwest
South Central Library System
Forest Products Laboratory
UW-La Crosse
UW-Madison MERIT
UW-Platteville
UW-Madison SLIS
Water Resources Library
UW-Madison GLS
Southwest Wisconsin Library System
Viterbo University
Wisconsin Historical Society

Northeast
Nicolet College
Rhinelander District Library
Wisconsin Valley Library System
OWLs
Fond du Lac Public Library

Southeast
Lakeland College
Silver Lake College
Milwaukee Public Museum
UW-Milwaukee
Arrowhead Library System
Blackhawk College
Alverno College
Lakeshores Library System
Cardinal Stritch University
Wisconsin Lutheran College
Milwaukee School of Engineering
Mount Mary College
Carroll University
Carthage College
Kenosha Public Library
Manitowoc-Calumet Library System
Milwaukee Institute of Art and Design
Medical College of Wisconsin
Waukesha County Technical College
New Berlin Public Library
Sacred Heart College
Waukesha County Technical College
Beloit College
Menominee Falls Public Library
The WiLS Board adopted a statement of Responsibilities of Board Members and a Statement of Ethics/Conflict of Interest, signed by each member, on the recommendation of our auditor. Discussion over the year focused closely on implementation of the new membership structure and the new service directions. Key issues included long-term financial sustainability and assessing member reaction to new services and fees.

**Representing Private Colleges**
Ane Carriveau—treasurer (Ripon), Lisa Viezbicke (Beloit),
Carol Brill—alternate (Alverno)

**Representing Public Libraries/Systems**
Phyllis Christensen (Marathon County Public Library), Paul Kiely—alternate
(Milwaukee Public Library), David Weinhold—Chair (Eastern Shores Library System),
Jeff Gilderson-Duwe—alternate (Winnefox Library System)

**Representing School Libraries**
Kathy Boguszewski (Janesville), Suzanne Zellmann (Mequon-Thiensville),
Esther Frost—alternate (Arcadia School District)

**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:**
Sott Silet (Waukesha), Patrick Wilkinson—Chair Elect (Ohkosh),
Ewa Barczyk (Milwaukee), Ed Van Gemert—alternate (Madison)

**Representing the DLTCL:** Sally Drew (Wisconsin Reference and Loan)

**Finance Committee**
The Finance Committee receives and reviews the annual Audit with special attention to the Management Letter and investigates and makes recommendations to the Board regarding member fees as well as monitoring income and expenses during the year. The Committee is composed of Board members and non Board members chosen for their special knowledge and experience in financial matters as well as key WiLS staff.

Board Members:
David Weinhold, Patrick Wilkinson, Ane Carriveau
Others: Peter Hamon, Mareda Weiss
WiLS Staff: Tom Klement, Kathy Schneider

**Related links available on WiLS Website:**

- [Board representatives](#)
- [Board meeting minutes](#)
- [Budget](#)
- [Member Account Information](#)
WiLS Staff

Mark Beatty, Trainer
Cheryl Bradley, Cooperative Purchasing Manager
Debbie Cardinal, Wisconsin Heritage Online Manager
Jennifer Champoux, Member Services Librarian
Nicole Fromm, Cataloging
Sara Gold, Cooperative Purchasing Librarian
Kirsten Houtman, Cooperative Purchasing Librarian
Tom Klement, Financial Consultant
Fran Metcalf, Reference Librarian
Angela Milock, ILL Services Librarian
Emily Pfotenhauer, WHO Outreach Specialist
Joy Pohlman, ILL Services Librarian
Jane Richard, Member Services
Eric Robinson, Interlibrary Loan Coordinator
Shirley Schenning, OCLC Billing and Events Planning
Kathy Schneider, Director
Bob Shaw, ILL Services Librarian
Allen Wenzel, ILL Automation
Sheila Zillner, Graphic/Web Designer
Tom Zillner, Research Coordinator

Student clerical support—Renee Peterson, Lisa Martin
Retrieval and shipping support—student assistants

STAFF UPDATES
• Nichole Fromm left WiLS to catalog for Madison Public Library, and we welcomed Jen Champoux as our research intern for a 2-year term. Jen keeps our Level 1 membership initiatives running smoothly.

• Angela Milock joined the WiLS ILL staff during the year.

• Kirsten Houtman transitioned from OCLC Services to managing the Cooperative Purchasing licensing for our academic libraries.