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April 2003

## **Report on County Standards.**

The County Board adopted changes to Chapter 23 of the County Code of Ordinances based on recommendations of the Act 150 Planning Committee. Among other things, the adopted plan includes library standards, including a library service effort ratio allowing libraries an alternate method of meeting requirements.

State law, ss 43.11(3)(d) required approval by 50% of the library boards representing 80% of the communities. This was done in 2001.

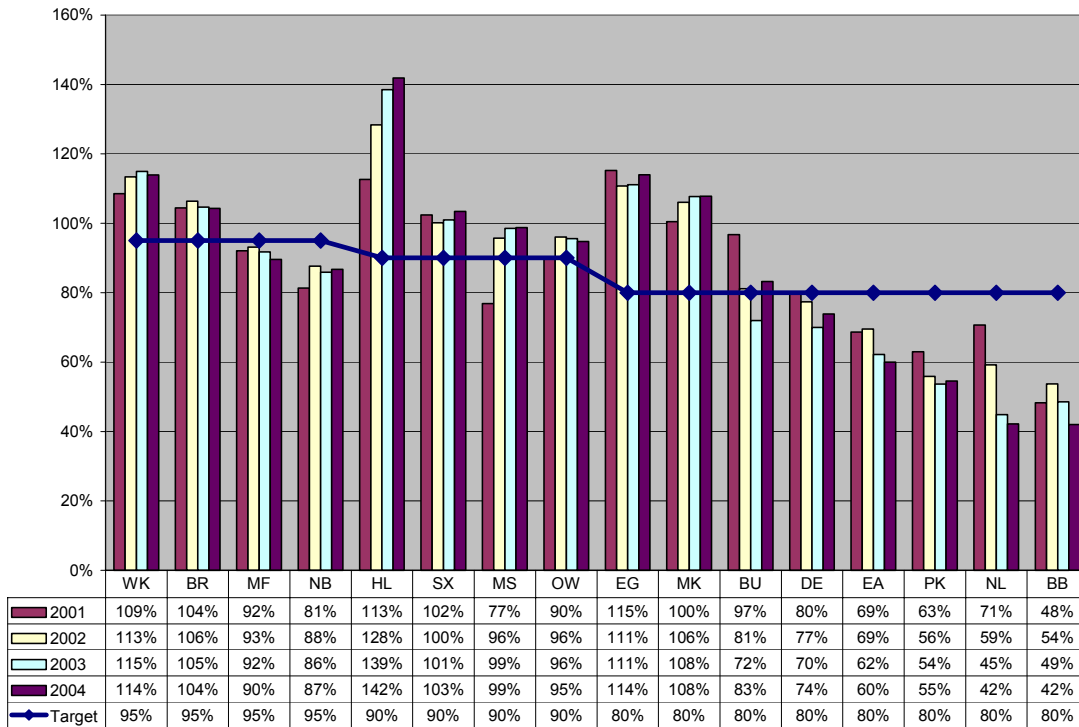
- 1. All 16 libraries met or exceeded the standards as reported in their Annual Reports filed in March of 2003 for 2002 activities.*
2. During 2003, the Act 150 Committee reviewed and recommended retention of the standards as developed in 2000.

# Library Service Effort Ratio Report

Section 23-5 of the County Code sets the **Library Service Effort Ratio**. It is designed to measure a library community's progress toward meeting resident user library needs. A library could either meet this requirement and serve most of the needs of its community locally or meet the numerical standards on the next page. Failure to do either would result in loss of the ability to exempt from the county library levy set in 2002 for 2003 purposes.

According to the county plan, if most of your residents, most of the time, do most of their library business locally, the numerical standards will not apply. This is because residents will not be imposing any undue burden on neighboring libraries. The **Library Service Effort Ratio** allows library communities to retain exemption from the county levy if their residents do most of their library business at home.

- A ratio below 100% indicates that many of the community's residents are borrowing materials from libraries other than their own – commonly called a crossover borrowing community.
- A ratio over 100% indicates that the library is a net lending community for crossover purposes.



The population sizes divide the libraries into three groups. Larger libraries are assumed to be better able to address the needs of their own residents. Three standard target levels based on population recognize ability to provide resources, services and economies of scale. The population categories and target ratios are as follows:

Population	Ratio
Under 10,000	80%
10,000 to 29,999	90%
Over 30,000	95%

# Numerical Standards Comparison

Standards are phased in from 75% of state basic for 2002 to 100% in 2007.

Municipality	Popul. Category	Category	Standard	Basis	2001 Popul (for 04)	Actual 02 (for 03) for 2004 exemption	Meets Standard for 04 Exemption?	2002 (using 99 Popul) & 2001 Ann Rept for 02 Exemption for 03 Budget)	2003 (using 00 Popul for 04 exemption)	2004 (using 01 Popul for 05 budget)	2005 (using 01 Popul for 06 Budget)	2006 (using 01 Popul for 07 Budget)	2007 (using 01 Popul for 08 Budget)
Big Bend	e) Under 2.5k	FTE	0.8	Per 1000 popul	1,281	1.4	Yes	0.8	0.8	0.9	0.9	1.0	1.0
Brookfield	b) 25K	FTE	0.5	Per 1000 popul	38,823	32.6	Yes	14.0	15.5	16.5	17.5	18.4	19.4
Butler	e) Under 2.5k	FTE	0.8	Per 1000 popul	1,875	1.8	Yes	1.2	1.2	1.3	1.4	1.4	1.5
Delafield	c) 5k	FTE	0.8	Per 1000 popul	6,535	8.0	Yes	3.8	4.1	4.4	4.7	5.0	5.2
Eagle	d) 2.5 k	FTE	0.8	Per 1000 popul	4,933	3.1	Yes	2.4	3.1	3.4	3.6	3.7	3.9
Elm Grove	c) 5k	FTE	0.8	Per 1000 popul	6,275	7.3	Yes	3.8	4.0	4.3	4.5	4.8	5.0
Hartland	c) 5k	FTE	0.8	Per 1000 popul	8,004	11.2	Yes	4.8	5.1	5.4	5.8	6.1	6.4
Menomonee Falls	b) 25K	FTE	0.5	Per 1000 popul	32,778	23.0	Yes	11.3	13.1	13.9	14.8	15.6	16.4
Mukwonago	c) 5k	FTE	0.8	Per 1000 popul	6,247	11.7	Yes	3.5	3.9	4.2	4.5	4.7	5.0
Muskego	c) 10 k	FTE	0.7	Per 1000 popul	21,491	15.5	Yes	10.9	12.0	12.8	13.5	14.3	15.0
New Berlin	b) 25K	FTE	0.5	Per 1000 popul	38,652	15.6	Yes	14.0	15.3	16.4	17.4	18.4	19.3
North Lake	c) 5k	FTE	0.8	Per 1000 popul	8,010	5.1	Yes	4.5	5.1	5.4	5.8	6.1	6.4
Oconomowoc	c) 10 k	FTE	0.7	Per 1000 popul	12,545	13.5	Yes	6.2	6.9	7.5	7.9	8.3	8.8
Pewaukee	c) 5k	FTE	0.8	Per 1000 popul	8,176	7.4	Yes	4.3	5.2	5.6	5.9	6.2	6.5
Sussex-Lisbon	c) 10 k	FTE	0.7	Per 1000 popul	18,358	12.8	Yes	8.9	10.2	10.9	11.6	12.2	12.9
Waukesha	a) 50k	FTE	0.5	Per 1000 popul	65,324	47.1	Yes	23.6	25.9	27.8	29.4	31.0	32.7
Big Bend	e) Under 2.5k	Materials \$	5.67	Per capita	1,281	\$19,407	Yes	\$6,005	\$5,797	\$6,174	\$6,537	\$6,900	\$7,263
Brookfield	b) 25K	Materials \$	4.96	Per capita	38,823	\$333,567	Yes	\$138,589	\$153,359	\$163,678	\$173,306	\$182,934	\$192,562
Butler	e) Under 2.5k	Materials \$	5.67	Per capita	1,875	\$11,661	Yes	\$8,739	\$8,532	\$9,037	\$9,568	\$10,100	\$10,631
Delafield	c) 5k	Materials \$	5.67	Per capita	6,535	\$50,059	Yes	\$27,105	\$29,357	\$31,495	\$33,348	\$35,201	\$37,053
Eagle	d) 2.5 k	Materials \$	5.67	Per capita	4,933	\$23,482	Yes	\$17,206	\$21,882	\$23,775	\$25,173	\$26,572	\$27,970
Elm Grove	c) 5k	Materials \$	5.67	Per capita	6,275	\$69,735	Yes	\$26,740	\$28,345	\$30,242	\$32,021	\$33,800	\$35,579
Hartland	c) 5k	Materials \$	5.67	Per capita	8,004	\$81,812	Yes	\$33,994	\$35,857	\$38,575	\$40,844	\$43,114	\$45,383
Menomonee Falls	b) 25K	Materials \$	4.96	Per capita	32,778	\$217,627	Yes	\$112,091	\$129,543	\$138,192	\$146,321	\$154,450	\$162,579
Mukwonago	c) 5k	Materials \$	5.67	Per capita	6,247	\$89,822	Yes	\$24,928	\$27,951	\$30,107	\$31,878	\$33,649	\$35,420
Muskego	c) 10 k	Materials \$	5.31	Per capita	21,491	\$119,865	Yes	\$82,892	\$90,894	\$97,000	\$102,705	\$108,411	\$114,117
New Berlin	b) 25K	Materials \$	4.96	Per capita	38,652	\$220,414	Yes	\$139,169	\$151,657	\$162,957	\$172,543	\$182,128	\$191,714
North Lake	c) 5k	Materials \$	5.67	Per capita	8,010	\$72,192	Yes	\$32,230	\$36,234	\$38,604	\$40,875	\$43,146	\$45,417
Oconomowoc	c) 10 k	Materials \$	5.31	Per capita	12,545	\$115,258	Yes	\$47,113	\$52,599	\$56,622	\$59,953	\$63,283	\$66,614
Pewaukee	c) 5k	Materials \$	5.67	Per capita	8,176	\$40,075	Yes	\$30,554	\$37,059	\$39,404	\$41,722	\$44,040	\$46,358
Sussex-Lisbon	c) 10 k	Materials \$	5.31	Per capita	18,358	\$98,311	Yes	\$67,499	\$77,258	\$82,859	\$87,733	\$92,607	\$97,481
Waukesha	a) 50k	Materials \$	4.61	Per capita	65,324	\$463,202	Yes	\$217,916	\$239,075	\$255,972	\$271,029	\$286,086	\$301,144
Big Bend	e) Under 2.5k	Hours Ope	25	Per typical week	1,281	28.0	Yes	18.8	20.0	21.3	22.5	23.8	25.0
Brookfield	b) 25K	Hours Ope	62	Per typical week	38,823	67.0	Yes	46.5	49.6	52.7	55.8	58.9	62.0
Butler	e) Under 2.5k	Hours Ope	25	Per typical week	1,875	41.0	Yes	18.8	20.0	21.3	22.5	23.8	25.0
Delafield	c) 5k	Hours Ope	56	Per typical week	6,535	62.0	Yes	42.0	44.8	47.6	50.4	53.2	56.0
Eagle	d) 2.5 k	Hours Ope	44	Per typical week	4,933	46.0	Yes	33.0	35.2	37.4	39.6	41.8	44.0
Elm Grove	c) 5k	Hours Ope	56	Per typical week	6,275	56.0	Yes	42.0	44.8	47.6	50.4	53.2	56.0
Hartland	c) 5k	Hours Ope	56	Per typical week	8,004	61.0	Yes	42.0	44.8	47.6	50.4	53.2	56.0
Menomonee Falls	b) 25K	Hours Ope	62	Per typical week	32,778	68.0	Yes	46.5	49.6	52.7	55.8	58.9	62.0
Mukwonago	c) 5k	Hours Ope	56	Per typical week	6,247	60.0	Yes	42.0	44.8	47.6	50.4	53.2	56.0
Muskego	c) 10 k	Hours Ope	59	Per typical week	21,491	64.0	Yes	44.3	47.2	50.2	53.1	56.1	59.0
New Berlin	b) 25K	Hours Ope	62	Per typical week	38,652	67.0	Yes	46.5	49.6	52.7	55.8	58.9	62.0
North Lake	c) 5k	Hours Ope	56	Per typical week	8,010	56.0	Yes	42.0	44.8	47.6	50.4	53.2	56.0
Oconomowoc	c) 10 k	Hours Ope	59	Per typical week	12,545	62.0	Yes	44.3	47.2	50.2	53.1	56.1	59.0
Pewaukee	c) 5k	Hours Ope	56	Per typical week	8,176	52.0	Yes	42.0	44.8	47.6	50.4	53.2	56.0
Sussex-Lisbon	c) 10 k	Hours Ope	59	Per typical week	18,358	59.0	Yes	44.3	47.2	50.2	53.1	56.1	59.0
Waukesha	a) 50k	Hours Ope	67	Per typical week	65,324	73.0	Yes	50.3	53.6	57.0	60.3	63.7	67.0
Big Bend	e) Under 2.5k	Collection	8.6	Per capita	1,281	13,363	Yes	9,107	8,793	9,364	9,915	10,466	11,017
Brookfield	b) 25K	Collection	3.6	Per capita	38,823	154,257	Yes	100,589	111,309	118,798	125,787	132,775	139,763
Butler	e) Under 2.5k	Collection	8.6	Per capita	1,875	21,335	Yes	13,255	12,941	13,706	14,513	15,319	16,125
Delafield	c) 5k	Collection	5.5	Per capita	6,535	57,825	Yes	26,293	28,477	30,551	32,348	34,145	35,943
Eagle	d) 2.5 k	Collection	6.3	Per capita	4,933	30,931	Yes	19,117	24,313	26,416	27,970	29,524	31,078
Elm Grove	c) 5k	Collection	5.5	Per capita	6,275	36,637	Yes	25,938	27,496	29,336	31,061	32,787	34,513
Hartland	c) 5k	Collection	5.5	Per capita	8,004	58,777	Yes	32,975	34,782	37,419	39,620	41,821	44,022
Menomonee Falls	b) 25K	Collection	3.6	Per capita	32,778	114,680	Yes	81,356	94,023	100,301	106,201	112,101	118,001
Mukwonago	c) 5k	Collection	5.5	Per capita	6,247	74,304.0	Yes	24,181	27,113	29,205	30,923	32,641	34,359
Muskego	c) 10 k	Collection	4.2	Per capita	21,491	96,779	Yes	65,564	71,894	76,723	81,236	85,749	90,262
New Berlin	b) 25K	Collection	3.6	Per capita	38,652	127,674	Yes	101,010	110,074	118,275	125,232	132,190	139,147
North Lake	c) 5k	Collection	5.5	Per capita	8,010	37,083	Yes	31,263	35,147	37,447	39,650	41,852	44,055
Oconomowoc	c) 10 k	Collection	4.2	Per capita	12,545	95,021	Yes	37,265	41,604	44,786	47,420	50,055	52,689
Pewaukee	c) 5k	Collection	5.5	Per capita	8,176	46,558	Yes	29,638	35,948	38,223	40,471	42,720	44,968
Sussex-Lisbon	c) 10 k	Collection	4.2	Per capita	18,358	77,341	Yes	53,389	61,108	65,538	69,393	73,248	77,104
Waukesha	a) 50k	Collection	3.4	Per capita	65,324	299,008	Yes	160,719	176,324	188,786	199,891	210,997	222,102

## Waukesha County Federated Library System Proposed Standards Implementation Steps

Chronology would be comparable for any given year.

ss. 43.64(2m) Wisconsin Statutes provides that:

No city, village, town or school district is exempt from the tax levy under sub. (2) for any year if, by September 1 of the year preceding the year for which the tax is levied, the county board determines that the public library of the city, village, town or school district that is a member of the public library system has not complied with standards approved under s. 43.11 (3) (d).

For a levy set in 2003 for 2004 tax purposes, these are the steps that would need to be taken to implement the exemption noted above.

- **February 2003** - Libraries file annual report indicating the necessary data for hours, staffing, materials collection size and materials spending for the year 2000.
- **May 2003** – System Director files report with the Waukesha County Federated Library System Board regarding the libraries that have met standards and should be granted an exemption based on annual report data.
- **May 2003** - Member libraries may submit documentation indicating extenuating circumstances for not having met the standards in the past and/or for budgetary plans to do so in the current calendar year.
- **July 2003** - System Board submits a report to the County Executive and the County Board indicating which libraries it judges should be granted exemption. Libraries recommended for non-exemption may submit additional documentation directly to the County Board and County Executive for additional consideration.
- **August 30, 2003** - County Board considers exemption issues and determines exemption eligibility as indicated in ss 43.64 (2m). Presentations to the county oversight committee by libraries that are considered ineligible for exemption would be encouraged.
- **November 2003** – County Board sets the levy for 2003 purposes. The levy includes exemptions to the county levy for communities with libraries except those that the county deems ineligible for exemption because of failure to meet the standards.

3. ***The City of Pewaukee and the Village of Pewaukee have appointed a joint planning committee to consider the issue of forming a joint library.***
  - State law allows the County Board the authority to forbid or allow the formation of joint libraries. Cities do not require county permission to form libraries, either jointly or singly. When the Town of Pewaukee became a city in 1999, the county board lost the ability to determine whether or not any library formed by the city served the best interests of the county as a whole. But the county does have the ability to set library standards as a condition for exemption from the county library levy.
  - The law requires the County Board to take action on granting exemptions based on the standards by August 31, 2003 when preparing to set the levy for 2004 purposes. That means that any requests for reconsideration of a community's exemption status would need to be made in writing to the county board no later than August \_\_\_\_ 2003.

### **County Standards Applied to Barbara Sanborn Library - Pewaukee**

**This summary of how the standards apply to the communities of Pewaukee City and Village, and/or a merged community was prepared in 2002 for 2003 purposes. It would need minor revisions for 2004 purposes, but it does approximate the required benchmarks.** The standards comparison on the next page provides further details. Although the current building is clearly inadequate, the county standards are not a direct issue for the library. The County Library Plan allows the community to make its own determination on the status of the building and costs, although there must be enough space to house the staff and materials required. Further information on state standards is in the appendix.

- **Village Library**, Population about 9,000. Pewaukee Village's library, the Barbara Sanborn Library, meets or exceeds all current county library standards. Although, as a village library, the village will need to open a few more hours by 2006 and spend a couple thousand dollars more for materials by 2006 to meet them.
- **City Library**, Population about 12,000: It has been suggested that the village stop supporting the Barbara Sanborn Library and that the City take over funding. The village would be subject to the county library levy. The City would be exempt because it funded a library locally, providing that it met minimum standards and mill rate requirements.
- **Joint Library or Consolidated Community**, Population 21,000. A joint library, or a consolidated community library, would meet none of the standards except open hours to start with. At least, that is, without substantial changes and costs.

### **Impact of Change in Pewaukee City Exemption on Rest of County**

The result of the potential changes can be confusing because of the unique nature of library taxation in Wisconsin. For the county special library levy there is a complicated interplay because of current laws that are based on **prior** year funding and library use rates. The results might be described as a roller coaster, with the effects of changed community exemption from the levy showing up in subsequent years.

In Waukesha County currently there are 18 communities that own and operate libraries and 19 that do not. In 2002 the 18 library communities will tax themselves an estimated \$9.7 million locally for library operating costs. The county special library levy on the remaining 19 municipalities is budgeted at \$2.34 million. For the 2002 budget the Village of Pewaukee is expected to tax itself at least \$239,000, an effective mill rate of about \$0.42 per \$1,000 of equalized value. The City of Pewaukee is subject to the County Levy, a rate of \$0.27 for an amount of \$454,360.

If a newly merged community or joint library had exempted from the County tax in 2001, the tax rate paid by the **remaining** library communities would have risen 23.6% to a mill rate of \$0.336 for 2001 – although the needed amounts and rates would fall again in 2002. The tax amount for 2001 is set and funds are distributed based on **prior year** operations, but the tax would have been paid by one less jurisdiction if Pewaukee City exempted. In addition, the increase in the county mill rate caused by Pewaukee City's exemption forces other communities to pay more to continue to qualify for the exemption from the county library levy.

Four Waukesha County library communities, Delafield, Eagle, Town of Merton and New Berlin, would have to increase their funding levels to continue to qualify for exemption. These communities were below the \$0.336 per thousand minimum in 2001 and would be required by ss 43.64 Wisconsin Statutes to meet or exceed that rate in 2002 to continue to qualify for exemption from the county special library levy. That in turn would increase the allowable costs defined in County Ordinance 23-4 for 2002 purposes.

