

# Hennen's Library Consulting

Thomas J. Hennen Jr.  
6014 Spring Street  
Racine, WI 53406

Voice: 262-886-1625

e-mail: [thennen@haplr-index.com](mailto:thennen@haplr-index.com)  
Web site: <http://www.haplr-Index.com>



## **District Library Planning in Racine County Final Report – November 2004**

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## Related Documents Provided by Consultant to Committee

- **Public Library District Enabling Legislation for Wisconsin** (*September 2004*). 9 pages.
- **Joint Library Issues for Wisconsin Libraries: Administrative Report**. *January 2002*. 17 pages.
- **Hennen’s American Public Library Rating Special Report: Racine County Libraries**, *August 2004*. 14 Pages.
- **Draft of District Legislation Bill (LRB0160.2)** *For the 2003-2004 Wisconsin Legislature*.

# Chapter 1. Executive Summary

## *Introduction*

Racine Public Library received a 2004 Library Services and Construction Act grant to study the pros and cons for district library development in Racine County. This report outlines Library Consultant Tom Hennen's proposals for that study.

Although 20 states have legislation allowing district libraries, Wisconsin is not one of them. The Wisconsin Library Association (WLA) and the System and Resource Library Administrator's Association of Wisconsin (SRLAAW) have both endorsed district. A summary of the proposed legislation is provided in chapter 8.

Part of the purpose of the LSTA grant to Racine Public Library is to gather information on possible changes to the district library legislation that WLA hopes to have introduced in the next legislative session that starts in January of 2005. Note that the legislation being proposed in Wisconsin is, as is the case in all 20 states with similar legislation, **permissive** only. That means that the legislature is simply allowing local units of government to form districts, not **requiring** them to do so.

This report recommends consideration of a library district east of I-94 encompassing Racine City and the six other communities there. It also makes specific recommendations for the revision of library district legislation being proposed by the Wisconsin Library Association.

## *Who was on the committee? When did it meet?*

The committee consisted of: Jessica Macphail, Racine Public Library Director; Gayle Falk, Burlington Public Library Director; Doug Stansil, Racine County Budget Director; Steve Nenonen, Racine City Administrator, Cathy Stepp, State Senator; John Lehman State Representative; Mary Stapleton, Rochester Library Director; Pam Belden, Waterford Library Director. Thomas J. Hennen Jr. of Hennen's Library Consulting was the consultant for the project.

Meetings were held on August 13, September 10, October 8, and October 25<sup>th</sup>.

## *What options were considered?*

Options considered (see chapters 2 & 3 for details):

1. Consolidated County
2. Districts East and West
3. Suburban District with Racine
4. Suburban District without Racine
5. Mount Pleasant as Stand Alone Library
6. West End Library District Without Current Libraries

***What options were recommended?***

Committee members recommended that only option 3, a suburban district, east of I-94 and including the city of Racine be advanced. This means that no districts are recommended for the area west of I-94 and that the county would continue to tax the 6 towns without libraries for library services with the county special library levy.

**Figure 1. Activities and Timeline**

<b>Item</b>	<b>Comments</b>	<b>Date</b>
1. <b><i>Meeting</i></b> with steering committee to discuss the scope of the project. HAPLR report listing results for each library. PowerPoint presentation on planning needs and issues to resolve. Preliminary report	½ hr presentation, with one hour for discussion. HAPLR report for each library. Written report of about 15 to 20 pages.	August 13
2. <b><i>Planning Group meetings.</i></b> (approximately two 1 1/2 hour meetings at various times and places)	As indicated.	August 27 Sept 10 Sept 24 Oct 8
3. Draft Report	RPL to distribute draft report.	Oct 25
4. <b><i>Final version of all reports issued by consultant.</i></b>		Nov. 15

***What changes were recommended to the draft legislation?***

The committee reviewed the draft legislation, including revisions made to the draft by the Wisconsin Library Association subcommittee based on recommendations of the Arrowhead Library System (Rock County). The following recommendations were made by the committee. Note that an overview of the proposed legislation is provided in chapter 8. The committee recommended that the draft legislation should:

1. Provide for the possibility of using a local proposed, dedicated sales tax to supplement or supplant the use of property tax dollars for a library district.
2. Provide that any library district plan must define how an existing library’s outstanding assets and liabilities will be transferred to the new library district. This includes the transfer of bonded indebtedness, unfunded pension liabilities, pending judgments, and so forth.
3. Allow an existing municipality to provide specific indirect cost services for such things as personnel administration, payroll processing, and legal services to be contracted from one or more of the municipalities in the library district or from private businesses.
4. The current language in the WLA position that would write job protection into statute should be eliminated. In its place there should be a provision that requires the district plan to specify employment conditions and circumstances.

## Organization of the Report

- This report begins in **Chapter 1** by providing an executive summary of the committee's conclusions.
- **Chapter 2** indicates the committee's recommendation to explore a joint library district for Racine City and the 6 municipalities east of Interstate 94 in Racine County.
- **Chapter 3** indicates the other options for districts or consolidation considered by the committee.
- **Chapter 4** discusses the use of impact fees to fund library services in library districts.
- **Chapter 5** covers the variety of types of library organizations found in the U.S., Wisconsin, and Racine County.
- **Chapter 6** provides background information on library services in Racine County.
- **Chapter 7** discusses circulation patterns in the county and their impact on districts.
- **Chapter 8** looks at the current Wisconsin Library Association proposal for library district legislation.
- **Chapter 9** provides further background information on library districts.

## **Chapter 2. East of I-94 District (Recommended Option)**

This scenario is based on discussions at the September 10 meeting of the Racine County District Planning committee. At that meeting the committee reviewed, among other options, the option of two library districts – one east of I-94 and one west of I-94. Library Consultant Tom Hennen was asked to delineate another option: a district east of I-94 and the continuation of the current federated library structure west of I-94. A library district East of I-94 radically changes the communities subject to the county library tax. Only the 6 non-library communities west of I-94 would be subject to the county library levy.

As Chapter 7 demonstrates there is very little cross use by residents of libraries East and West of I-94. For purposes of this option, the use by residents of the West end non-library and library communities at Racine Public Library is ignored, as is the use by Racine and Suburban residents at West end libraries.

A district that includes the communities East of I-94 will probably require a branch or branches. Currently the Racine Library is on the lakefront and residents of the suburban communities will expect branches if they are to pay a much larger share of the taxes as is required in a library district.

Table 2 estimates the added ongoing costs of providing branch services to be about \$750,000 per year. This estimate was obtained by using the Capital Costs Calculator developed by the consultant. It is assumed that this cost would need to be added to the current operating costs of Racine Public Library. That current cost (including estimated ongoing capital expenses) amounts to about \$3.8 million, so adding \$750,000 for branch operations brings the total library district budget to a total of \$4.6 million.

As table 1 demonstrates, the district would mean an increase of 121% in library taxes for the suburbs and a decrease of 23% for the city. In this scenario the county would continue to tax the remaining 6 non-library communities on the west end. For simplicity, I have included the tax and library distributions to the four west end libraries at exactly the same rate. It is likely, however, that residents of the west end will continue to use Racine Library. In fact the use would likely increase with branches closer to the I-94. The County Levy on non-library communities would need to take that use into account and continue to provide Racine Public Library with some (relatively small) reimbursement for that use.

I have also assumed the payment by Racine to Kenosha for use by residents of that library, as well as payment for use of Waukesha and Walworth libraries by west end residents. The new Racine district would probably pay Kenosha rather than, as at present, the county; although the Lakeshores Library System would probably continue to negotiate payment rates. It is also possible that branch libraries would attract use back from northern Kenosha county residents as well, so this should be considered in the district planning.

The County's library levy would fall from the current \$1.9 million assessed over 12 communities to \$520,000 assessed over only 6 non-library municipalities on the west end of the county. As indicated in table 1, the mill rate on the remaining 6 non-library communities would fall as well.

**Table 1. Comparison of Current Funding with East of I-94 District**

The table below indicates the current tax base, usage and funding levels for libraries in the county. It compares the current data to projections for a district east of I-94. Note that no provision is made for the marginal use by west end communities of the Racine Library or the use by east end residents at west end libraries for purposes of this table.

	A	B	C	E	G	H	K	N	O	P	Q	R	S
2					Currenrt County Levy			District East, County Tax West					
3	City	Status	Eq Value for 2004	Resident Circ	Library tax with Estimated Capital	Distribution of County Dollars	Combined County, Local, Capital & InterSystem	East of I94 Distr with Branch & West End Federation	Transfers	District Expenditure	Current mill rates	District Tax Rates	Change in Rate
4	Racine	Lib	\$2,914,339,850	562,111	\$2,518,636	\$1,293,004	\$3,811,640	\$1,933,753	\$2,627,888	\$4,561,640	0.86	0.66	-23%
5	Caledonia	Non-lib	\$1,599,339,700	185,894	\$479,802	(\$479,802)	\$0	\$1,061,210	(\$1,061,210)		0.30	0.66	121%
6	Elmwood Park	Non-lib	\$36,403,400	7,330	\$10,921	(\$10,921)	\$0	\$24,155	(\$24,155)		0.30	0.66	121%
7	Mount Pleasant	Non-lib	\$1,874,606,100	163,284	\$562,382	(\$562,382)	\$0	\$1,243,858	(\$1,243,858)		0.30	0.66	121%
8	North Bay	Non-lib	\$29,031,100	3,500	\$8,709	(\$8,709)	\$0	\$19,263	(\$19,263)		0.30	0.66	121%
9	Sturtevant	Non-lib	\$206,269,000	22,391	\$61,881	(\$61,881)	\$0	\$136,866	(\$136,866)		0.30	0.66	121%
10	Wind Point	Non-lib	\$214,815,100	21,601	\$64,445	(\$64,445)	\$0	\$142,536	(\$142,536)		0.30	0.66	121%
11	East Intersystem					\$70,651	\$70,651		\$70,651	\$70,651			
12													
13	Burlington - City	Lib	\$520,277,200	89,811	\$336,288	\$179,840	\$516,128	\$336,288	\$179,840	\$516,128	0.65	0.65	0%
14	Rochester - Town	Lib	\$186,294,000	20,690	\$62,329	\$25,714	\$88,043	\$62,329	\$25,714	\$88,043	0.33	0.33	0%
15	Rochester - Village	Lib	\$59,120,900	10,753	\$33,674	\$0	\$33,674	\$33,674	\$0	\$33,674	0.57	0.57	0%
16	Union Grove	Lib	\$220,793,700	31,511	\$162,507	\$75,898	\$238,405	\$162,507	\$75,898	\$238,405	0.74	0.74	0%
17	Waterford - Village	Lib	\$281,188,900	49,504	\$296,440	\$238,556	\$534,996	\$296,440	\$238,556	\$534,996	1.05	1.05	0%
18	Burlington - Town	Non-lib	\$472,181,100	50,302	\$141,654	(\$141,654)	\$0	\$99,413	(\$99,413)		0.30	0.21	-30%
19	Dover	Non-lib	\$243,745,200	18,884	\$73,124	(\$73,124)	\$0	\$51,318	(\$51,318)		0.30	0.21	-30%
20	Norway	Non-lib	\$574,304,100	44,754	\$172,291	(\$172,291)	\$0	\$120,914	(\$120,914)		0.30	0.21	-30%
21	Raymond	Non-lib	\$330,297,400	13,873	\$99,089	(\$99,089)	\$0	\$69,541	(\$69,541)		0.30	0.21	-30%
22	Waterford - Town	Non-lib	\$530,555,100	54,634	\$159,167	(\$159,167)	\$0	\$111,703	(\$111,703)		0.30	0.21	-30%
23	Yorkville	Non-lib	\$318,785,500	16,306	\$95,636	(\$95,636)	\$0	\$67,117	(\$67,117)		0.30	0.21	-30%
24	West Intersystem	Int Syst		-	\$0	\$45,438	\$45,438		\$45,438	\$45,438			
25	Total		\$10,612,347,350	1,367,134	\$5,338,975	\$0	\$5,338,975	\$5,972,886	\$116,089	\$6,088,975	0.50	0.56	12%
26													
27	East End (4 to 11)		\$6,874,804,250	966,111	\$3,706,776	\$175,515	\$3,882,291	\$4,561,640	\$70,651	\$4,632,291	0.54	0.66	23%
28	West End (13 to 24)		\$3,737,543,100	401,023	\$1,632,199	(\$175,515)	\$1,456,684	\$1,411,246	\$45,438	\$1,456,684	0.44	0.38	-14%

**Table 2. Branch Cost Estimates**

A branch or branches are needed in the proposed district East of I-94. There are over 55,000 residents in the area outside the City of Racine. The planning committee used the Capital Cost Calculator developed by the consultant to estimate costs for a building and contents for a branch or branches serving those 55,079 residents. The estimated \$10.67 million in capital costs would cost about \$750,956 if funds were borrowed at 3.5% for a 20 year bond. Some portion of this cost could be offset by impact fees (see chapter 4).

**Capital Cost Calculator c 2003 haplr-index.com**

<b>Name of Library:</b>	<b>West End Branch</b>		
<b>Population Served</b>	55,079		
<b>Property Tax Base Value</b>	\$3,960,464,400		
<b>Category</b>			
	<b>Calculated</b>	<b>National Avg</b>	<b>% Avg</b>
Building Costs per sq. ft	\$143.00	\$143.10	100%
Equipment Costs per sq. ft	\$25.00	\$26.73	94%
Site costs - sq ft	\$17.00	\$17.34	98%
Other Costs per sq. ft	\$21.00	\$20.53	102%
Combined cost per sq foot	\$206.00	\$207.70	99%
Square Feet Needed	55,000		
Square feet per capita	1.0	1.5	66.6%
Building & Furnishings cost	\$11,330,000		
Volumes- Capital	121,000	154,221	78%
Unit Cost/Volume	20.00	\$25.00	80%
Capital cost for volumes Subtotal	\$2,420,000		
Building and Volumes Total	\$13,750,000		
Percent of cost to be borrowed	100%		
Bond Interest rate	3.500%		
Capital Amorization Period	20		
Total Principle and Interest	\$19,349,296		

**Table 3. Current circulation data**

Includes circulation by East end suburbs as if they were part of a District rather than subject to the county library levy. Uses 2003 circulation data and 2004 estimated spending. Unit cost in line 23 is estimated library cost in line 22 divided by circulation in line 14. County-taxed at local cost amount in line 24 is the unit cost in line 23 times circulation to county-taxed areas in line 17. The table demonstrates the amount of payments needed for each library to reimburse each for remaining county-taxed circulation after an east of I-94 district is formed.

	A	B	C	D	E	F	G	H	I
1	Community	Burlington	E of I94 Distr & Racine	Rochester	Union Grove	Waterford	Waukesh a	Wal Libr	Circ Total
2	Burlington - City	81,119	2,786	591	148	3,828	103	1,236	89,811
3	E of I94 Distr & Racine	9,503	952,701	270	1,542	1,090	512	493	966,111
4	Rochester - Town	4,693	590	6,747	-	8,612	35	13	20,690
5	Rochester - Village	793	10	5,602	12	4,205	-	131	10,753
6	Union Grove	402	5,291	92	24,771	696	128	131	31,511
7	Waterford - Village	1,539	1,859	1,773	10	44,137	139	47	49,504
8	Burlington - Town	43,008	809	1,157	207	4,446	35	640	50,302
9	Dover	6,998	1,749	323	6,624	3,057	45	88	18,884
10	Norway	1,531	1,007	666	566	25,454	15,468	62	44,754
11	Raymond	177	6,268	-	5,345	1,726	354	3	13,873
12	Waterford - Town	1,387	1,008	1,461	41	45,533	5,180	24	54,634
13	Yorkville	224	4,855	-	10,695	527	-	5	16,306
14	Totals	151,374	978,933	18,682	49,961	143,311	22,000	2,873	1,367,134
15									
16	Home Library	81,119	952,701	12,349	24,771	44,137			1,115,077
17	County Taxed Areas	53,325	15,696	3,607	23,478	80,743	21,083	822	198,754
18	COB LENDING	16,930	10,536	2,726	1,712	18,431	917	2,051	53,303
19	COB Borrowing	(8,692)	(13,410)	(19,094)	(6,740)	(5,367)			(53,303)
20	Net COB LENDING	8,238	(2,874)	(16,368)	(5,028)	13,064	917	2,051	-
21	Net COB and County	61,563	12,822	(12,761)	18,450	93,807	22,000	2,873	198,754
22	Library costs	\$456,750	\$3,373,133	\$77,914	\$210,978	\$473,448	\$57,200	\$7,470	4,656,893
23	Unit cost	\$3.02	\$3.45	\$4.17	\$4.22	\$3.30	\$2.60	\$2.60	\$3.41
24	County-taxed at local unit cost	\$160,901	\$54,084	\$15,043	\$99,144	\$266,746	\$54,815	\$2,137	\$652,870

# Chapter 3. Other Options for District Organization

## Option 1. Consolidated County

This scenario considers the tax impact for a single countywide consolidated library district. In this scenario, there would be no Racine County Board library levy on non library communities because all communities would be in a countywide library district with separate taxing authority. Current law would allow for such a formation as a “consolidated county,” but District law will probably accommodate it better by adding more independence, a separate voter approved levy, and an elected board. Note that the projections assume no change in the total costs of a consolidated operation so that the table simply notes the tax shifting that would take place. Capital costs are conservatively estimated by using national experience factors that show \$0.13 spent for capital for every dollar spent for library operational costs. Library community residents (with the exception of Rochester Town) would see substantial reductions in their levy rates – from a 12% to a 52% reduction. Non-library communities would see a 68% increase.

Figure 2. Consolidated County Scenario

	B	C	G	H	J	K	L	M	N	O	P
	City	Status	Library Tax	Distribution of County Dollars	Estimated Capital (at 13 cents per operating dollar)	Combined County, Local and Capital Expend.	Current Operating and capital tax	Consolidated County	Current mill rates	Consolidated mill rates	Percent Change
2											
3	Burlington - City	Lib	\$276,910	\$179,840	\$59,378	\$516,128	\$336,288	\$261,747	0.65	0.50	-22%
4	Racine	Lib	\$2,080,129	\$1,293,004	\$438,507	\$3,811,640	\$2,518,636	\$1,466,178	0.86	0.50	-42%
5	Rochester - Town	Lib	\$52,200	\$25,714	\$10,129	\$88,043	\$62,329	\$93,723	0.33	0.50	50%
6	Rochester - Village	Lib	\$29,800	\$0	\$3,874	\$33,674	\$33,674	\$29,743	0.57	0.50	-12%
7	Union Grove	Lib	\$135,080	\$75,898	\$27,427	\$238,405	\$162,507	\$111,079	0.74	0.50	-32%
8	Waterford - Village	Lib	\$234,892	\$238,556	\$61,548	\$534,996	\$296,440	\$141,464	1.05	0.50	-52%
9	East Intersystem	IntSyst		\$70,651		\$70,651					
10	West Intersystem	IntSyst		\$45,438		\$45,438					
11	Caledonia	Non-lib	\$479,802	(\$479,802)		\$0	\$479,802	\$804,613	0.30	0.50	68%
12	Elmwood Park	Non-lib	\$10,921	(\$10,921)		\$0	\$10,921	\$18,314	0.30	0.50	68%
13	Mount Pleasant	Non-lib	\$562,382	(\$562,382)		\$0	\$562,382	\$943,097	0.30	0.50	68%
14	North Bay	Non-lib	\$8,709	(\$8,709)		\$0	\$8,709	\$14,605	0.30	0.50	68%
15	Sturtevant	Non-lib	\$61,881	(\$61,881)		\$0	\$61,881	\$103,772	0.30	0.50	68%
16	Wind Point	Non-lib	\$64,445	(\$64,445)		\$0	\$64,445	\$108,072	0.30	0.50	68%
17	Burlington - Town	Non-lib	\$141,654	(\$141,654)		\$0	\$141,654	\$237,550	0.30	0.50	68%
18	Dover	Non-lib	\$73,124	(\$73,124)		\$0	\$73,124	\$122,626	0.30	0.50	68%
19	Norway	Non-lib	\$172,291	(\$172,291)		\$0	\$172,291	\$288,927	0.30	0.50	68%
20	Raymond	Non-lib	\$99,089	(\$99,089)		\$0	\$99,089	\$166,170	0.30	0.50	68%
21	Waterford - Town	Non-lib	\$159,167	(\$159,167)		\$0	\$159,167	\$266,917	0.30	0.50	68%
22	Yorkville	Non-lib	\$95,636	(\$95,636)		\$0	\$95,636	\$160,378	0.30	0.50	68%
23	Total		\$4,738,112	(\$0)	\$600,863	\$5,338,975	\$5,338,975	\$5,338,975	0.50	0.50	0%
24											
25	Library Communities		\$2,809,011	\$1,858,450	\$600,863	\$5,268,324	\$3,409,874	\$2,103,933	0.82	0.50	-38%
26	Non-Library Communities		\$1,929,101	(\$1,929,101)	-	\$0	1,929,101	3,235,042	0.30	0.50	68%
27	Ratio - Non Libr Commun		40.7%		0.0%	0.0%	36.1%	60.6%	59.6%	100.0%	

**Option 2. East and West End Districts**

**Figure 3. Estimated Tax Rates for Two Districts, One East and One West of I-94.**

In this scenario, there would be no county library levy on non library communities because all communities would be in one or the other of two library districts. If only one of the districts formed, the east end district, for instance; then the county would still continue to tax the west end non-library communities and reimburse libraries used by these residents. This scenario also assumes continued payments for inter-county borrowing at Kenosha, Walworth and Waukesha Counties.

A district East of I-94 would tax Racine and the 6 suburban communities. The mill rate for city taxpayers would fall 35% from 87 cents per \$1000 while the suburban rate would rise 88% from 30 cents to 56 cents per \$1000. Taxpayers in the suburbs, seeing that level of increase in library taxes would probably expect branch services or other extension activities. But it would probably take even larger tax increases to provide sufficient funds to provide branch services.

A District West of I-94 would see library community mill rates fall (with the exception of Rochester Town). Non library community rates would rise 30% from \$0.30 to \$0.39.

**Figure 4. East and West End Districts.**

	C	G	H	J	K	L	M	N	O	P	Q
	City	Library Tax	Distribution of County Dollars	Estimated Capital	Library tax with Estimated Capital	Combined County, Local, Capital & InterSystem	Current Operating and capital tax	Two Districts One East, One West	Current mill rates	District Tax Rates	Change in Rate
2											
3	Racine	\$2,080,129	\$1,293,004	\$438,507	\$2,518,636	\$3,811,640	\$2,518,636	\$1,645,766	0.86	0.56	-35%
4	Caledonia	\$479,802	(\$479,802)		\$479,802	\$0	\$479,802	\$903,168	0.30	0.56	88%
5	Elmwood Park	\$10,921	(\$10,921)		\$10,921	\$0	\$10,921	\$20,557	0.30	0.56	88%
6	Mount Pleasant	\$562,382	(\$562,382)		\$562,382	\$0	\$562,382	\$1,058,614	0.30	0.56	88%
7	North Bay	\$8,709	(\$8,709)		\$8,709	\$0	\$8,709	\$16,394	0.30	0.56	88%
8	Sturtevant	\$61,881	(\$61,881)		\$61,881	\$0	\$61,881	\$116,483	0.30	0.56	88%
9	Wind Point	\$64,445	(\$64,445)		\$64,445	\$0	\$64,445	\$121,309	0.30	0.56	88%
10	East Intersystem		\$70,651			\$70,651					
11											
12	Burlington - City	\$276,910	\$179,840	\$59,378	\$336,288	\$516,128	\$336,288	\$202,775	0.65	0.39	-40%
13	Rochester - Town	\$52,200	\$25,714	\$10,129	\$62,329	\$88,043	\$62,329	\$72,607	0.33	0.39	16%
14	Rochester - Village	\$29,800	\$0	\$3,874	\$33,674	\$33,674	\$33,674	\$23,042	0.57	0.39	-32%
15	Union Grove	\$135,080	\$75,898	\$27,427	\$162,507	\$238,405	\$162,507	\$86,053	0.74	0.39	-47%
16	Waterford - Village	\$234,892	\$238,556	\$61,548	\$296,440	\$534,996	\$296,440	\$109,592	1.05	0.39	-63%
17	Burlington - Town	\$141,654	(\$141,654)		\$141,654	\$0	\$141,654	\$184,030	0.30	0.39	30%
18	Dover	\$73,124	(\$73,124)		\$73,124	\$0	\$73,124	\$94,998	0.30	0.39	30%
19	Norway	\$172,291	(\$172,291)		\$172,291	\$0	\$172,291	\$223,831	0.30	0.39	30%
20	Raymond	\$99,089	(\$99,089)		\$99,089	\$0	\$99,089	\$128,731	0.30	0.39	30%
21	Waterford - Town	\$159,167	(\$159,167)		\$159,167	\$0	\$159,167	\$206,780	0.30	0.39	30%
22	Yorkville	\$95,636	(\$95,636)		\$95,636	\$0	\$95,636	\$124,245	0.30	0.39	30%
23	West Intersystem		\$45,438		\$0	\$45,438					
24	Total	\$4,738,112	\$0	\$600,863	\$5,338,975	\$5,338,975	\$5,338,975	\$5,338,975	0.50	0.50	0%
25											
26	East	\$3,268,269	\$175,515	\$438,507	\$3,706,776	\$3,882,291	\$3,706,776	\$3,882,291	0.54	0.56	5%
27	West	\$1,469,843	(\$175,515)	\$162,356	\$1,632,199	\$1,456,684	\$1,632,199	\$1,456,684	0.44	0.39	-11%

### **Option 3. Suburban Library District without Racine City**

Several or all of the Racine suburban communities might consider developing a suburban library district. This would cause quite a few unknown results. In the past 50 years there have been many such suburban developments in the country. A few of the better known examples are Baltimore County, including many suburbs of the city of Baltimore; Hennepin County, including many suburbs of the city of Minneapolis; and King County including many suburbs of the city of Seattle.

Current WLA proposal for district legislation would not accommodate a suburban district without Racine. The proposed legislation requires formation of a district to be based on a library that has been in existence for at least five years. Nevertheless, it is important to consider this option because it would take little to alter legislation to allow it, and it would have a major impact on library operations in the county.

The 6 suburban communities East of I-94 have a combined population of over 55,000 and a combined tax base of almost \$4 billion. Faced with a choice between the consolidated tax for a joint library including the city of Racine and forming a separate agency serving only the suburbs, it is possible that the six suburban communities could choose to fund a new and separate library agency.

In order to form a library in Wisconsin a community must meet or exceed the county rate in the prior year and meet or exceed relevant county standards (of which there are none in Racine County at present). The county board can forbid a town from forming a library or joining a joint library if it is deemed contrary to the best interests of the county as a whole, but it cannot stop a city or village.

The 6 suburban municipalities East of I-94 would be asked to generate a library tax rate of about \$0.56 in an East End district as noted in Option 1 above. That is about a \$2.23 million tax bill. The residents there would want to make some comparisons on running their own library system as opposed to joining in with the City of Racine. Consider for the 6 suburbs the proposed district tax amount and leaving out Racine the following would be true of a suburban library system in Wisconsin:

- Only 8 libraries would have a larger property tax base.
- Only 14 libraries would have a larger operating budget.
- Only 18 libraries state would serve a larger population.

Clearly the suburbs have the tax base and population to go it on their own if district law were to allow it, but the true imponderable in this scenario is projected circulation numbers. Would a new suburban library draw significant use by towns immediately west of I-94 and, if so, how much? Would a new suburban library system lend more to Racine City residents than the City of Racine Library would lend to suburban residents? That, of course is the \$64 dollar question!

- If so: the city of Racine would expect the suburbs to reimburse for that use.
- If not: the suburbs would expect the City of Racine to reimburse for that use.

Either way, a new source of disagreement would be introduced into county library discussions.

## **Figure 5. East End Suburban District without Racine**

This table demonstrates funding considerations that suburban officials and voters would need to consider when assessing their options for joining a district as compared to 1) building their own library, 2) the current federated county library levy, or 3) the projected costs for a library district East of I-94. It is based on a set of interactive budget tools using comparable building costs and state library standards for developing a library operating and capital costs. The lowest cost option is the current county levy, of course, but the cost to build and maintain a village library would only be marginally higher than a district tax. Suburban voters would need assurances that the district library would provide convenient access at a lower cost. They would also want to consider the possible revenue stream they could create by providing services to county taxed residents in the remaining non-library communities and/or revenue from use by their library by Racine City residents.

	B	D	E	F
1	<b>Name of Library:</b>	<b>Suburban</b>		
2	<b>Population Served</b>	55,079		
3	<b>Property Tax Base Value</b>	\$3,960,464,400		
4				
5	<b>Category</b>	<b>Calculated</b>	<b>National Avg</b>	<b>% Avg</b>
6	Building Costs per sq. ft	\$122.00	\$207.70	59%
7	Equipment Costs per sq. ft	\$15.00	\$26.73	56%
8	Site costs - sq ft	\$8.00	\$17.34	46%
9	Other Costs per sq. ft	\$5.00	\$20.53	24%
10	Combined cost per sq foot	\$150.00	\$207.70	72%
11	Square Feet Needed	55,000		
12	Square feet per capita	1.0	1.5	66.6%
13	Building & Furnishings cost	\$8,250,000		
14	Volumes- Capital	154,000	154,221	100%
15	Unit Cost/Volume	25.00	\$25.00	100%
16	Capital cost for volumes Subtotal	\$3,850,000		
17	Building and Volumes Total	\$12,100,000		
18	Percent of cost to be borrowed	100%		
19	Bond Interest rate	3.500%		
20	Capital Amortization Period	20		
21	Total Principle and Interest	\$17,027,381		
22	Annual payments	\$851,369		
23	Tax capacity (property per capita)	\$71,905	\$60,000	120%
24	<b>Summary</b>	<b>Suburban District without Racine</b>	<b>Current county levy</b>	<b>District without Branches</b>
25	Annual Capital Costs per capita	\$15.46		
26	Annual payment per \$1000 market value	\$0.21		
27	Annual Operating Costs	\$2,314,000	\$1,188,140	\$1,944,805
28	Operating costs per capita	\$42.01	\$21.57	\$35.31
29	Operating per \$1,000 market value	\$0.58	\$0.30	\$0.49
30	Capital and Operating Total	\$3,165,369	\$1,188,140	\$2,236,526
31	Capital & Operating per capita	\$57.47	\$21.57	\$40.61
32	Capital and Operating per \$1,000	\$0.80	\$0.30	\$0.56

#### Option 4. Mount Pleasant as Stand Alone Library

This table demonstrates funding considerations that Mount Pleasant officials and voters would need to consider when assessing their options for 1) joining a district as compared to building their own library, 2) the current federated county library levy, or 3) the projected costs for a library district East of I-94. It is based on a set of interactive budget tools using comparable building costs and state library standards for developing a library operating and capital costs. The lowest cost option is the current county levy, of course, but the cost to build and maintain a village library would only be marginally higher than the district tax levy. Village voters would need assurances that the district library would provide convenient access at a lower cost. They would also want to consider the possible revenue stream they could create by providing services

to county taxed residents in the remaining non-library communities and/or revenue from use by their library by Racine City residents.

	B	D	E	F
1	<b>Name of Library:</b>	<b>Mt. Pleasant</b>		
2	<b>Population Served</b>	23,330		
3	<b>Property Tax Base Value</b>	\$1,874,606,100		
4				
5	<b>Category</b>	<b>Calculated</b>	<b>National Avg</b>	<b>% Avg</b>
6	Building Costs per sq. ft	\$143.00	\$143.10	100%
7	Equipment Costs per sq. ft	\$26.00	\$26.73	97%
8	Site costs - sq ft	\$17.00	\$17.34	98%
9	Other Costs per sq. ft	\$21.00	\$20.53	102%
10	Combined cost per sq foot	\$207.00	\$207.70	100%
11	Square Feet Needed	35,000		
12	Square feet per capita	1.5	1.5	100.0%
13	Building & Furnishings cost	\$7,245,000		
14	Volumes- Capital	100,000	65,324	153%
15	Unit Cost/Volume	20.00	\$25.00	80%
16	Capital cost for volumes Subtotal	\$2,000,000		
17	Building and Volumes Total	\$9,245,000		
18	Percent of cost to be borrowed	100%		
19	Bond Interest rate	3.500%		
20	Capital Amorization Period	25		
21	Total Principle and Interest	\$14,023,286		
22	Annual payments	\$560,931		
23	Tax capacity (property per capita)	\$80,352	\$60,000	134%
24	Summary	Mt. Pleasant	<b>Current county levy</b>	<b>District without Branches</b>
25	Annual Capital Costs per capita	\$24.04		
26	Annual payment per \$1000 market value	\$0.30		
27	Annual Operating Costs	\$978,000	\$1,188,140	\$920,534
28	Operting costs per capita	\$41.92	\$50.93	\$39.46
29	Opertaing per \$1,000 market value	\$0.52	\$0.63	\$0.49
30	Capital and Operating Total	\$1,538,931	\$1,188,140	\$1,058,614
31	Capital & Operating per capita	\$65.96	\$50.93	\$45.38
32	Capital and Operating per \$1,000	\$0.82	\$0.63	\$0.56

## ***Option 5. West End Library District without Current Libraries***

Several or all of the West End non-library communities may want to consider developing their own library district without existing libraries. Note that the current WLA proposal for district legislation would not accommodate a district without at least one of the West End libraries. This is because the law, as proposed, requires formation of a district to be based on a library that has been in existence for at least five years. Nevertheless, it is important to consider this option because it would take little to alter legislation to allow it and it would have a major impact on library operations in the county.

The 6 communities West of I-94 have a combined population of over 31,000 and a combined tax base of about \$2.5 billion. That is more than sufficient to provide an adequate base for library services. Faced with a choice between the consolidated tax for a library district including the current library communities, forming a west-end district, or forming a separate agency serving only their own residents, it is possible that the six communities may wish to choose to fund a new and separate library agency.

In order to form a library in Wisconsin a community must meet or exceed the county rate in the prior year and meet or exceed relevant county standards (of which there are none in Racine County at present). The county board can forbid a town from forming a library or joining a joint library if it is deemed contrary to the best interests of the county as a whole, but it cannot stop a city or village from forming a library. Under current law, County Board could therefore stand in the way of this type of library formation whether the 6 towns west of I-94 wanted to do so on their own, or as sub-districts.

Since it is my understanding that the planning committee wishes to focus its energies and analysis on district formation east of I-94, this report does not include further projections on this scenario or any of those listed below. If the committee is interested in pursuing these scenarios, we can use the interactive spreadsheets that I have developed to look at them in depth.

### **West End Sub-District Options:**

- Waterford & Rochester Towns & Villages as District
- Burlington Town and City as District
- Union Grove and Yorkville as District

## Tax Base Considerations for 12 County-taxed Communities

For 2004 purposes, the 12 non-library communities subject to the county tax have a total tax base (state equalized value) of \$6.43 billion (see summary line 2, column L below). County funding and use rates are expected to be at parity in the next few years. That would mean the county library levy on these 12 non-library municipalities would be calculated by multiplying the use ratio in column D by the total operating costs for libraries in the county (the \$4,738,112 indicated in the heading for column E). The table below indicates the tax rate on the remaining non-library communities that would result if a given community exempted from the county library levy because of forming its own library. It also indicates the amount or revenue that would no longer be available for distribution to libraries. For example, if Caledonia were to exempt the county tax base would drop from \$6.43 billion in column B, line 2 to the \$4.8 Billion found in Column B, Line 4. Library circulation to non library communities would fall to the 416,860 found in line 4, column C. That would mean the ratio of non-library use would fall to the 30.5% found in column D. When that 30.5% is multiplied by the cost of library operations (\$4,738,112) it would yield the \$1,444,721 found in Column E. This would mean a loss of \$644,257 in funds for distribution to libraries. That, in turn, would mean the tax rate of \$0.299 per \$1,000 of state equalized value (mill rate) found in column G, line 4. Because of the varying tax capacities and use rates of each community, the impact on the remaining tax levies varies quite considerably, as examination of figure 16 indicates.

**Figure 6. Change in Tax Base and Use Base for Exemptions**

	A	B	C	D	E	F	G
	City	Eq Value 2004 if Community Exempts	"County" Circulation if this community Exempts	Library Use Ratio if community Exempts	Full funding at rate of use equalling rate of funding (Expenditure Base of \$4,738,112)	Revenue Lost by libraries from Library Levy if community exempts	Tax rate if community exempts & funding equals use rate
1							
2	None of 12 Exempted	\$6,430,332,800	602,753	44.1%	\$2,088,978	n/a	0.325
3							
4	Caledonia	\$4,830,993,100	416,860	30.5%	\$1,444,721	(\$644,257)	0.299
5	Mount Pleasant	\$4,555,726,700	439,469	32.1%	\$1,523,080	(\$565,898)	0.334
6	Sturtevant	\$6,224,063,800	580,362	42.5%	\$2,011,377	(\$77,601)	0.323
7	Wind Point	\$6,215,517,700	581,152	42.5%	\$2,014,115	(\$74,863)	0.324
8	Elmwood Park	\$6,393,929,400	595,423	43.6%	\$2,063,574	(\$25,404)	0.323
9	North Bay	\$6,401,301,700	599,253	43.8%	\$2,076,848	(\$12,130)	0.324
10							
11	Waterford - Town	\$5,899,777,700	548,119	40.1%	\$1,899,631	(\$189,347)	0.322
12	Burlington - Town	\$5,958,151,700	552,451	40.4%	\$1,914,644	(\$174,334)	0.321
13	Norway	\$5,856,028,700	558,000	40.8%	\$1,933,874	(\$155,104)	0.330
14	Dover	\$6,186,587,600	583,869	42.7%	\$2,023,531	(\$65,447)	0.327
15	Yorkville	\$6,111,547,300	586,447	42.9%	\$2,032,466	(\$56,512)	0.333
16	Raymond	\$6,100,035,400	588,880	43.1%	\$2,040,897	(\$48,081)	0.335

## Chapter 4. Impact Fees

A library district including the suburban communities East of I-94 would be an ideal candidate for impact fees. In growing communities, the use of impact fees can be a very effective tool in library capital funding and development. An impact fee is a property tax assessment placed on a new home while it is being built.

The theory behind impact fees is that new residents impose an impact on the library that should be borne by the new resident rather than current residents. The cost of the impact fee is usually rolled into the purchase price of a newly built home.

State law authorizes the impact fees for library purposes. The community taxing authority, usually the city or county, – unless the library is a taxing district, must endorse the proposed fees based on a plan presented to it by the library. The impact fee plan will ordinarily need to be developed by the library or its agents unless the municipal planning department or a hired consultant can develop it.

Revenue from impact fees may only be used by the library for capital costs. Capital costs for purposes of impact fees are defined in state legislation. The definition includes buildings and furnishings, of course. The fees can also include library materials and major maintenance on the building. Although the statutes allow the use of impact fees for library materials, remember that all the library district is doing is using the fee on a new home for the initial investment in materials. The household will continue to be taxed for operating purposes to maintain the collection.

Developers often oppose them and governing bodies have mixed responses. Impact fees cannot be used to close existing deficits. The fees can only be used to maintain standards levels that are based on the impact of new residents.

The area east of I-94, mostly Mount Pleasant and Caledonia, is growing at the rate of roughly 300 dwelling units a year. At a rate of \$500 each in impact fees, that would bring in \$150,000 per year for the library district for capital investments.

For more on the development of impact fees, see chapter 6 and appendix 3 in Hennen's American Public Library Planner, or the web site below.  
[http://www.haplr-index.com/sample\\_impact\\_fee\\_report.htm](http://www.haplr-index.com/sample_impact_fee_report.htm)

**Figure 7. Impact Fees Other Libraries**

<b>Name of Library</b>	<b>City and state</b>	<b>Service Population</b>	<b>Impact fee</b>	<b>Contact person</b>	<b>Contact information</b>
Maricopa County Library District	Phoenix, AZ	429,604	\$377	Harry R. Courtright	<a href="http://www.chapteraday.com/library/maricopa/">http://www.chapteraday.com/library/maricopa/</a>
Loveland Public Library	Loveland, CO	50,608	\$521	Ted Schmidt	<a href="mailto:schmit@ci.loveland.co.us">schmit@ci.loveland.co.us</a>
Citrus County Library System	Beverly Hills, FL	120,471	\$121	Flossie Benton Rogers	<a href="http://www.bocc.citrus.fl.us/library/library_services.htm">http://www.bocc.citrus.fl.us/library/library_services.htm</a>
New Lenox Public Library District	New Lenox, IL	28,759	\$107 to \$453	Jo Ann Potenziani	<a href="mailto:japotenziani@htls.lib.il.us">japotenziani@htls.lib.il.us</a>
Wilmington Public Library	Wilmington, IL	9,229	\$40 to \$95	Mary J. Soucie	<a href="mailto:mjsoucie@htls.lib.il.us">mjsoucie@htls.lib.il.us</a>
North Suburban Library System	Illinois	Varies by Chicago Suburb	\$120 to \$895	NSLS Fast Facts #430 - Builder Impact Fees	<a href="http://fastfacts.nsls.info/surveys/pff431sum_1.asp">http://fastfacts.nsls.info/surveys/pff431sum_1.asp</a>
Zion-Benton Public Library	Zion, IL	40,526	\$225	Nann Blaine Hilyard	<a href="mailto:nbhilyard@zblibrary.org">nbhilyard@zblibrary.org</a>
Waterford Public Library	Waterford, WI	13,765	\$400	Pam Belden	<a href="mailto:psbelden@waterford.lib.wi.us">psbelden@waterford.lib.wi.us</a>
Mukwonago Public Library	Mukwonago, WI	18,375	\$450	Kathy McBride	<a href="mailto:kmcbride@mukcom.lib.wi.us">kmcbride@mukcom.lib.wi.us</a>

## Chapter 5. Types of Library Organization

*This chapter considers the type of library organization in the U.S., Wisconsin, and in Racine County. Total spending varies by as much as a factor of three depending upon the form of library considered. As I have shown elsewhere (see Are Wider Units Wiser in the Appendix) there is a high correlation between per capita spending and per capita usage.*

### **National Types**

Municipal libraries are the most common type of library, representing 54.6% of libraries but only 34.2% of the U.S. population. District libraries are a distant fourth, covering only 8.6% of libraries and 8.5% of the population. Districts, however, are only legal in 40% of the states.

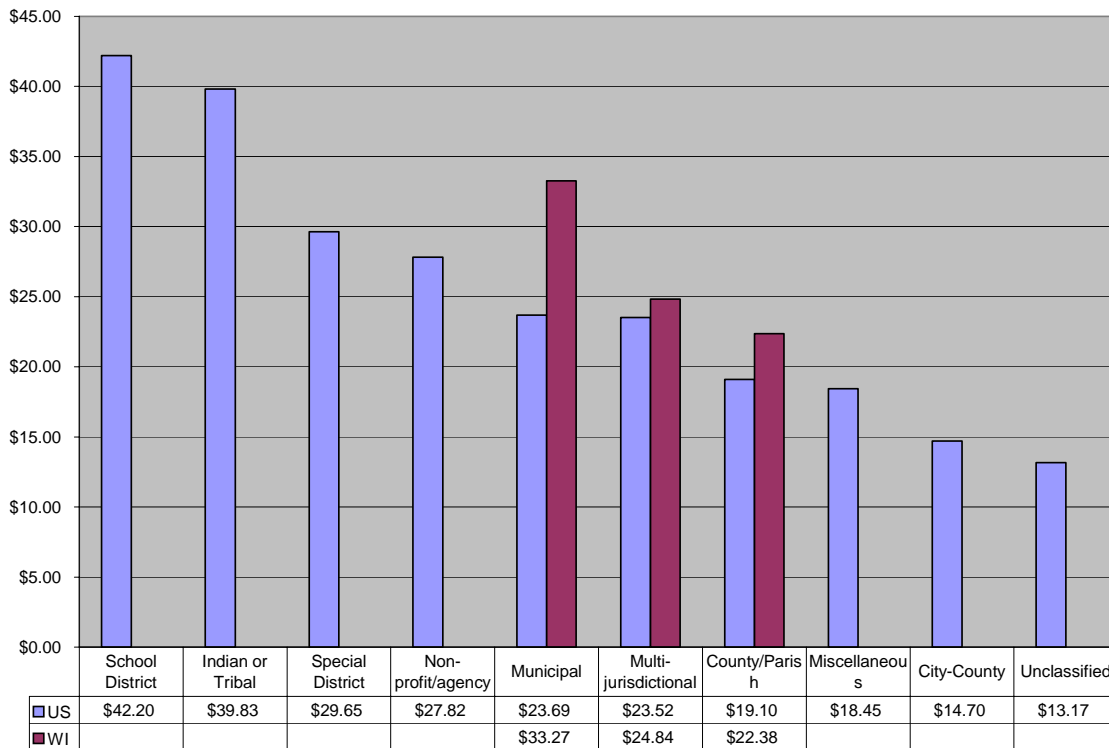
**Figure 8. Types of Library Organization in the U.S.**

Type of Library organization	Number of States with this library type	Percent of all U.S. Libraries	Percent of U.S. Popul. served
Municipal	46	54.60%	34.20%
County/Parish	39	11.40%	33.90%
Multi-jurisdictional	29	5.60%	9.90%
Special District	19	8.60%	8.50%
Unclassified	1	5.30%	4.40%
Non-profit/agency	18	9.80%	3.10%
School District	7	3.60%	2.70%
City-County	9	0.60%	2.00%
Miscellaneous	15	0.40%	1.30%
Indian or Tribal	5	0.30%	0.10%
Totals	--	100.00%	100.00%

## Types of Library Organization in Wisconsin

Wisconsin has only three of the possible library types of library organization: municipal, county, and multi-jurisdictional (joint library). The average Wisconsin library spends more than the national average on all of three types. Joint libraries (multi-jurisdictional), our closest thing to districts, spend less than municipal libraries just as they do elsewhere.

**Figure 9. Graph of Wisconsin Library Organizational Types**



## ***Types of Library Organizations in Racine County***

There are five libraries in Racine County. Burlington, Racine, Union Grove, and Waterford are **Municipal Libraries**. Rochester Village and Town operate a **Joint Library**.

Library users in the eastern part of the county also use Kenosha County libraries. Library users in the northwestern and western sections of the county are also served by libraries in Walworth and Waukesha Counties.

Racine County has a federated structure, meaning that the County Board taxes non-library communities to generate revenue with which to reimburse libraries for their service to non-library residents. The ratio of non-library community residents to library community residents is far higher in Racine County than in most counties. In the state of Wisconsin an average of only 27% of residents live in communities without their own libraries. In Racine County that number is 46%.

On average the “county-taxed” residents of the state pay \$16.98 per capita and that amounts to 18% of library operating budgets. County taxes in Racine amount to \$17.59 per capita, very close to the state average, but that is over 36% of operating costs, nearly twice the state average rate. Municipal rates in the county are almost \$10 per capita lower on average than the state average. Please note that the per capita rates tell only part of the story. When we compare things based on taxes per \$1,000 of property value (mill rates) a different picture emerges. (See Chapter 5.)

<b>2003 Library Data from Wisc. Libr. Service Record</b>	<b>Municipal Appropriation</b>	<b>County Appropriation</b>	<b>County &amp; Municipal Appropriation</b>	<b>County Ratio</b>	<b>Municipal Per capita</b>	<b>"County" per capita</b>
Racine	\$2,053,402	\$1,089,368	\$3,142,770	35%	\$25.32	\$17.49
Burlington	\$276,155	\$176,976	\$453,131	39%	\$27.34	\$20.21
Waterford	\$213,396	\$189,399	\$402,795	47%	\$49.71	\$15.39
Graham (Union Grove)	\$132,580	\$66,658	\$199,238	33%	\$29.79	\$17.90
Rochester	\$72,800	\$18,807	\$91,607	21%	\$20.79	\$34.51
<b>Total</b>	\$2,748,333	\$1,541,208	\$4,289,541	36%	\$26.56	\$17.59
<b>State Averages</b>	\$118,940,045	\$25,457,815	\$144,397,860	18%	\$36.13	\$16.98

# Chapter 6. Background Information on Racine County Libraries

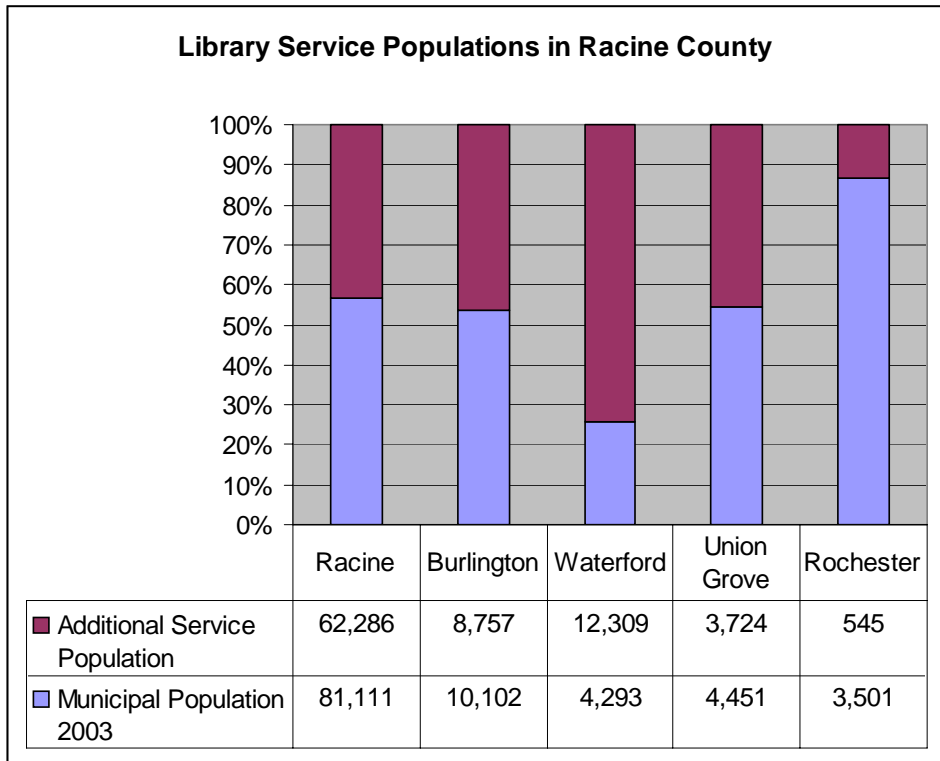
*This chapter gives the reader a glimpse of the current situation for taxes and use in the county. Each of the five libraries is affected quite differently by non-resident use. This is true for the degree of use by non residents (from under 15% to over 70%). As we will see in Chapter 4, the distribution of users is quite varied as well. This chapter looks at current taxation patterns in the county and compares "tax capacity" for each jurisdiction. Tax capacity is a key consideration for most municipal planners and needs to be considered here.*

## Rate of Non-Resident Population Use

The libraries in the county vary in their relative service to county-taxed non-residents. The State assigns population in direct correlation to the relative service provided by the library to county non-residents.

Relatively little of the county-taxed population is assigned to Rochester because relatively few county-taxed residents use that library. A relatively large piece of the county-taxed population is assigned to Waterford because of the heavy use there. The other libraries in the county fall between the extremes of Waterford and Rochester.

**Figure 10. Rate of Library Service Populations for Racine County Libraries**



## Tax capacity Issues

Municipal planners use the term “Tax Capacity” to measure the relative ability of communities to handle tax burdens. It is a measure of total state equalized property value per resident. The state annually issues equalized property tax assessments of each municipality in the county. The equalized values are intended to reflect the estimated full market value of all property in the community.

Some communities are less affluent than others and Tax Capacity measures this factor. As the table below demonstrates, there are a wide range of values for tax capacity in Racine County, from a high of \$116,179 in Equalized Valuation per Capita in Wind Point to a low of \$35,687 in the City of Racine.

There are large variations in the tax capacity of communities that must be considered when planning for districts in Racine County. A less affluent community needs a higher mill rate to generate the same amount per capita than its more affluent neighbor. Putting communities with disparate tax capacities into the same taxing jurisdiction results in an increase for the community with a high tax capacity and a corresponding decrease for communities with low tax capacity.

**Figure 11. Tax Capacity by Community in Racine County**

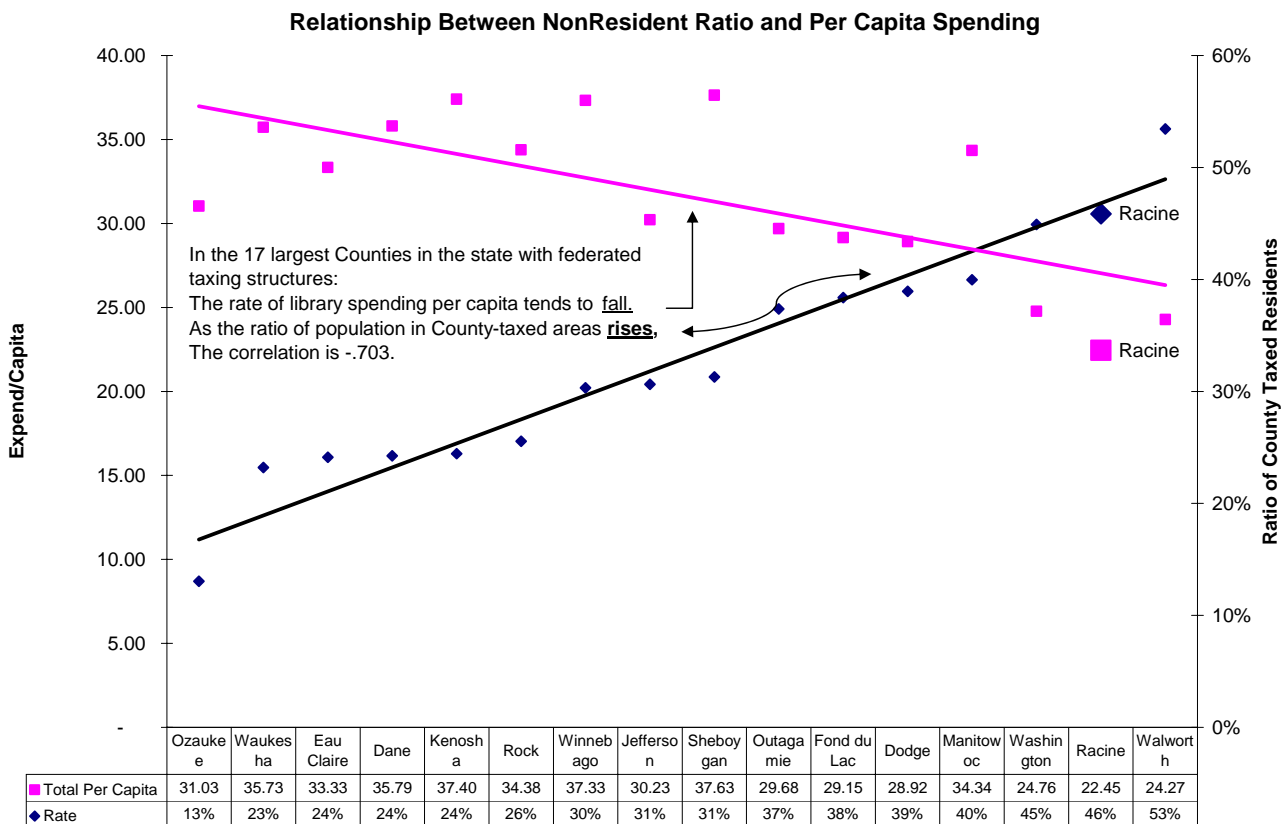
	A	B	C	D	E
1	Community	East/West	Type	Tax Capacity	Percent of County avg
2	Wind Point	East	Non lib	116,179	207%
3	North Bay	East	Non lib	112,089	200%
4	Yorkville	West	Non lib	96,660	173%
5	Raymond	West	Non lib	92,885	166%
6	Waterford - Town	West	Non lib	87,681	157%
7	Rochester - Town	West	Lib	81,601	146%
8	Mount Pleasant	East	Non lib	80,352	143%
9	Elmwood Park	East	Non lib	75,999	136%
10	Norway	West	Non lib	75,141	134%
11	Burlington - Town	West	Non lib	73,491	131%
12	Waterford - Village	West	Lib	69,464	124%
13	Caledonia	East	Non lib	67,064	120%
14	Dover	West	Non lib	61,786	110%
15	Burlington - City	West	Lib	52,247	93%
16	Rochester - Village	West	Lib	51,499	92%
17	Union Grove	West	Lib	50,687	90%
18	Sturtevant	East	Non lib	38,816	69%
19	Racine	East	Lib	35,687	64%
20	Total			56,015	100%
21					
22	Library Communities			40,422	72%
23	Non-Library Communities			74,774	133%
24					
25	W lib Communities			58,169	104%
26	W. Non Lib Commun			79,884	143%
27	West Total			70,906	127%
28					
29	Racine			35,687	64%
30	East Non Lib Commun			71,905	128%
31	East Total			50,275	90%

## Population Served and Library Expenditures

Racine County has more residents in library communities than the state norm. In the average federated county, the population in non-library communities account for 27% of the population. In Racine County the figure stands at 46%.

State law provides that communities can only exempt from the county library levy by taxing at a higher mill rate than the county levy on non-library communities. The result is that county-taxed areas generate less revenue than municipally taxed areas. With almost half of the population in the county-taxed area, Racine County libraries end up spending less per capita than most libraries in major counties. There is a negative 0.7 correlation between high county-taxed ratios and low library spending per capita.

**Figure 12. Non Resident Population Correlation with Per Capita Library Spending**



## Current Tax Patterns

The “non-Library Communities” represent about 61% of the tax base, 45% of the population, 44% of library circulation, and 42% of library operating taxes (see line 27 below). When estimated capital costs are included, the non-library communities pay 37% of current taxes but would pay 61% of taxes in a consolidated county. Please note that the circulation data here do **not** include circulation by Kenosha libraries to Racine County residents. Note the progress in county funding over the past 15 years by comparing lines 27 to 31. In 1989 the county-taxed residents paid 14.8% of the bill for 28.8% of the use so the cup was considered half full. In 2004 the rate was 40.7% of the funding for 44.1% of the circulation so the cup is 92% full.

**Figure 13. Equalized Values, Population, Circulation and Library Spending**  
Racine County Estimates for 2004.

	A	B	C	D	E	F	G
2	City	East/ West	Status	Eq Value for 2004	Popul	Resident Circ	Library Tax
3	Burlington - City	w	Lib	\$520,277,200	9,958	89,811	\$276,910
4	Racine	e	Lib	\$2,914,339,850	81,665	562,111	\$2,080,129
5	Rochester - Town	w	Lib	\$186,294,000	2,283	20,690	\$52,200
6	Rochester - Villag	w	Lib	\$59,120,900	1,148	10,753	\$29,800
7	Union Grove	w	Lib	\$220,793,700	4,356	31,511	\$135,080
8	Waterford - Villag	w	Lib	\$281,188,900	4,048	49,504	\$234,892
9	East Intersystem			n/a			
10	West Intersystem		Int Syst	n/a		-	
11	Burlington - Town	w	Non-lib	\$472,181,100	6,425	50,302	\$141,654
12	Caledonia	e	Non-lib	\$1,599,339,700	23,848	185,894	\$479,802
13	Dover	w	Non-lib	\$243,745,200	3,945	18,884	\$73,124
14	Elmwood Park	e	Non-lib	\$36,403,400	479	7,330	\$10,921
15	Mount Pleasant	e	Non-lib	\$1,874,606,100	23,330	163,284	\$562,382
16	North Bay	e	Non-lib	\$29,031,100	259	3,500	\$8,709
17	Norway	w	Non-lib	\$574,304,100	7,643	44,754	\$172,291
18	Raymond	w	Non-lib	\$330,297,400	3,556	13,873	\$99,089
19	Sturtevant	e	Non-lib	\$206,269,000	5,314	22,391	\$61,881
20	Waterford - Town	w	Non-lib	\$530,555,100	6,051	54,634	\$159,167
21	Wind Point	e	Non-lib	\$214,815,100	1,849	21,601	\$64,445
22	Yorkville	w	Non-lib	\$318,785,500	3,298	16,306	\$95,636
23	Total			\$10,612,347,350	189,455	1,367,134	\$4,738,112
24	<b>2004 County to Total Ratios</b>						
25	Library Communities			\$4,182,014,550	103,458	764,381	\$2,809,011
26	Non-Library Communities			\$6,430,332,800	85,997	602,753	\$1,929,101
27	Non-Library Ratio			60.6%	45.4%	44.1%	40.7%
28	<b>Comparable from 1989</b>						
29	Library Communities					705,326	\$1,833,734
30	Non-Library Communities					285,050	\$310,000
31	Non-Library Ratio					28.8%	14.5%

# Chapter 7. Circulation Patterns in Racine County

*This chapter considers the circulation patterns in the county by providing four graphs of current use. When considering possible configurations for joint libraries, it is important to have a good understanding of current library use patterns.*

*Circulation by the 12 Non-library communities at libraries varies considerably by geography, of course. The tables in this chapter illustrate the patterns graphically.*

*A first major finding in the data is this:*

- *Residents that live east of I-94 use Racine Public Library almost exclusively while residents west of I-94 use the four libraries west of I-94 almost exclusively.*

*A second major finding has to do with use by county residents of libraries in adjacent counties:*

- *Residents East of I-94 do most of their intersystem borrowing from Kenosha's Southwest Branch, while residents on the West End of the county do most of their borrowing at the Lake Geneva Library in Walworth or at Waukesha County libraries (mostly Muskego and Waukesha).*

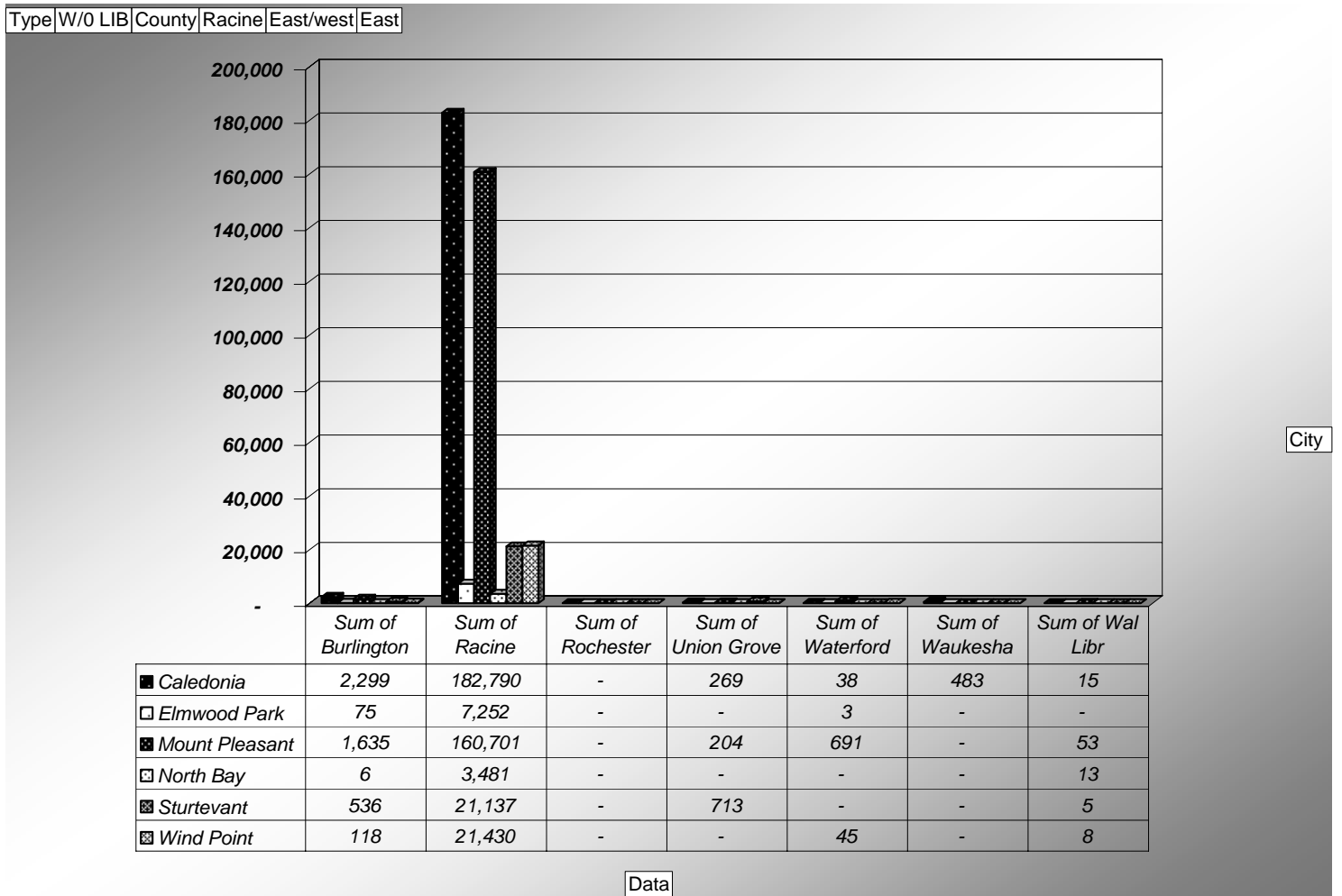
*A third major finding regards crossover borrowing. It is this:*

- *Crossover borrowing (use by one library community's residents of another library) is far more limited here than in many urbanized counties. There is very little use of the Racine Public Library by west end library community residents. There is, however a fair amount of crossover use by residents of Rochester, Waterford, and Burlington.*

**Figure 14. Circulation by Communities East of I-94**

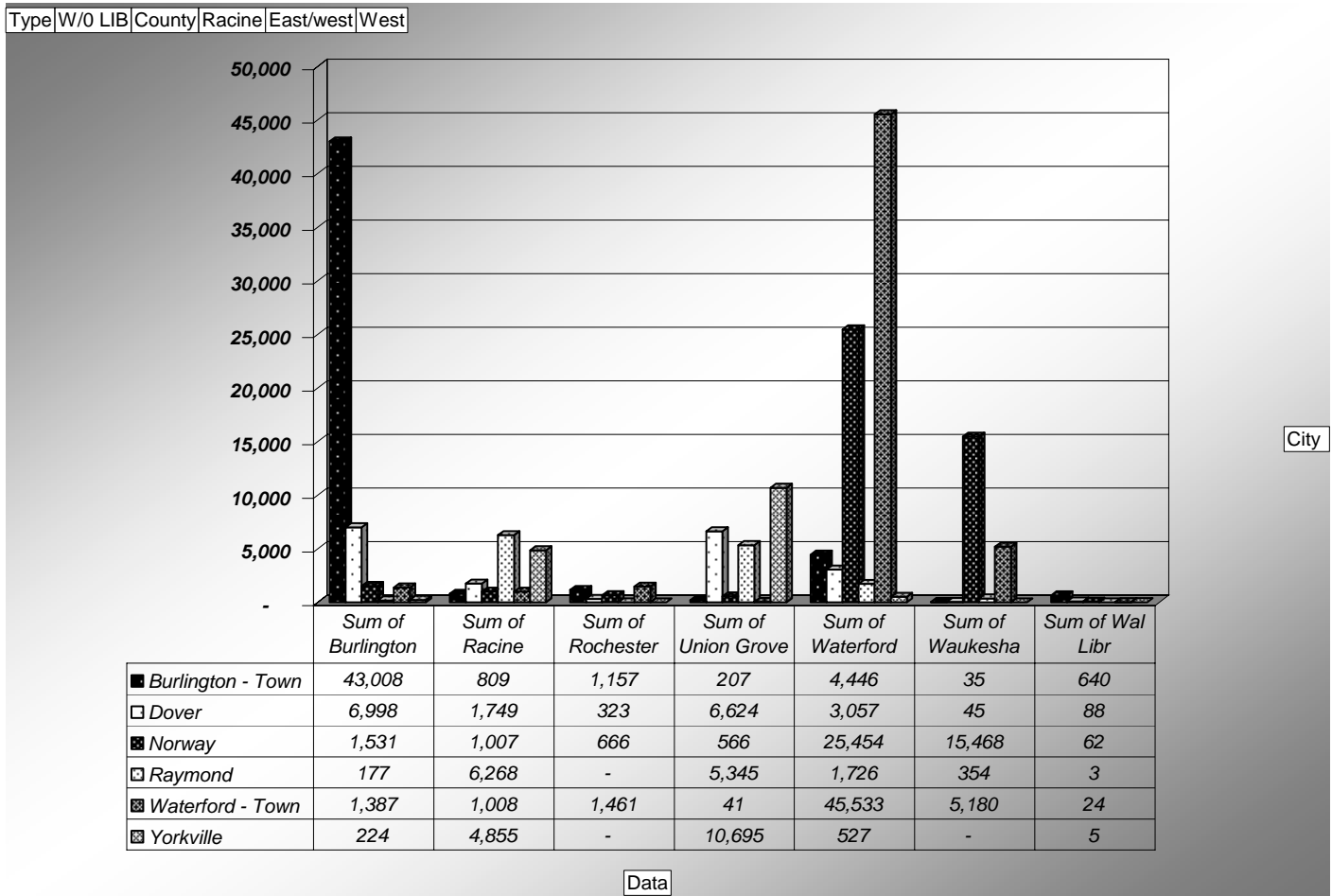
Clearly the six communities that are east of I-94 (East End non-library communities) use the Racine Public Library almost exclusively. Only traces of use are found at other libraries.

*Note however that not shown here is the significant use by East End non-library community residents of Kenosha libraries, mostly the Northwest Library.*



**Figure 15. Circulation by Communities West of I-94**

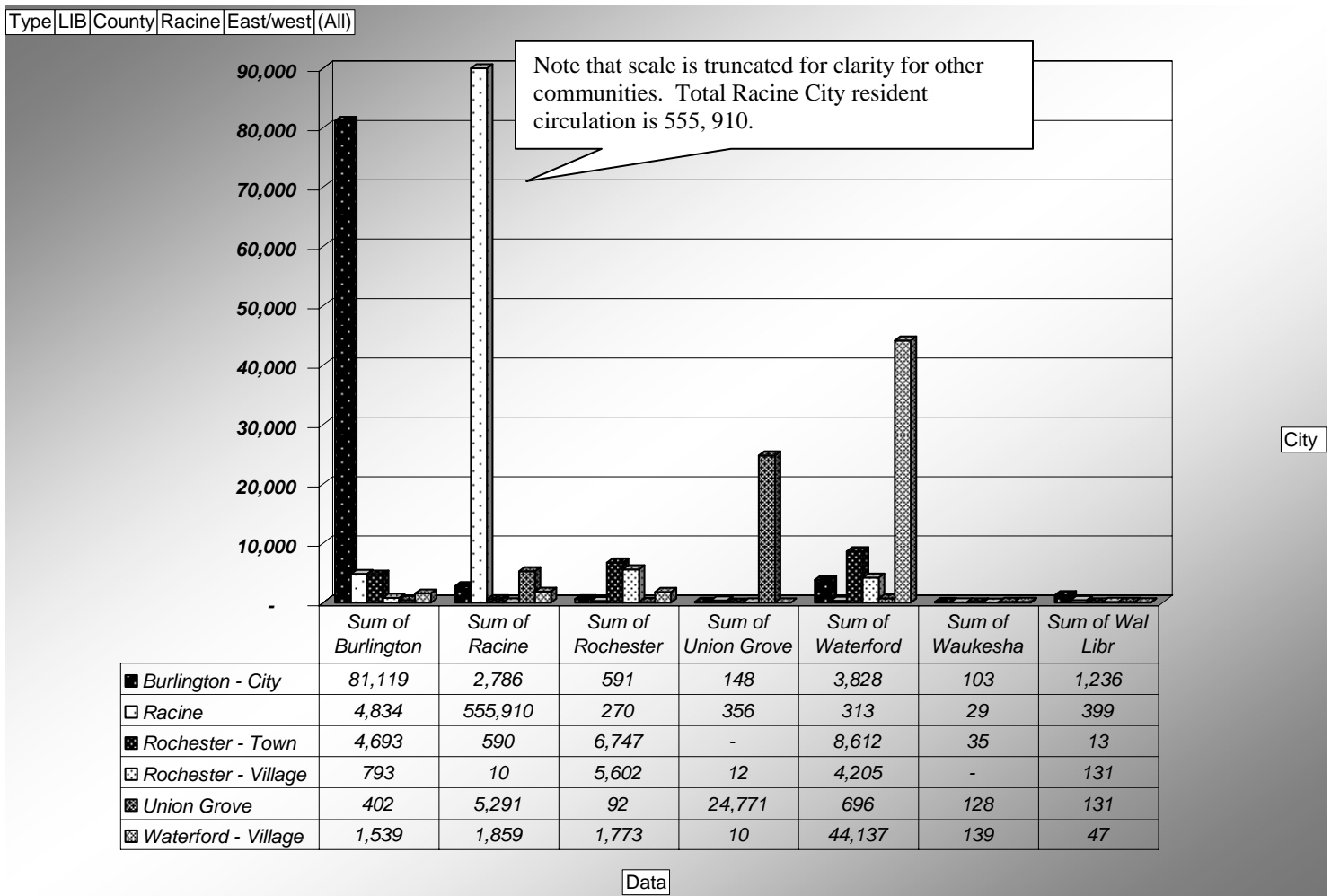
The six communities west of I-94 make little use of Racine Public Library, but their traffic patterns vary widely among the other libraries on the West End. This is to be expected since library users tend to visit the library closest to them.



## Figure 16. Circulation by Library Community Residents

Most residents use their own library most of the time; although Rochester residents use Waterford more than they do their own library.

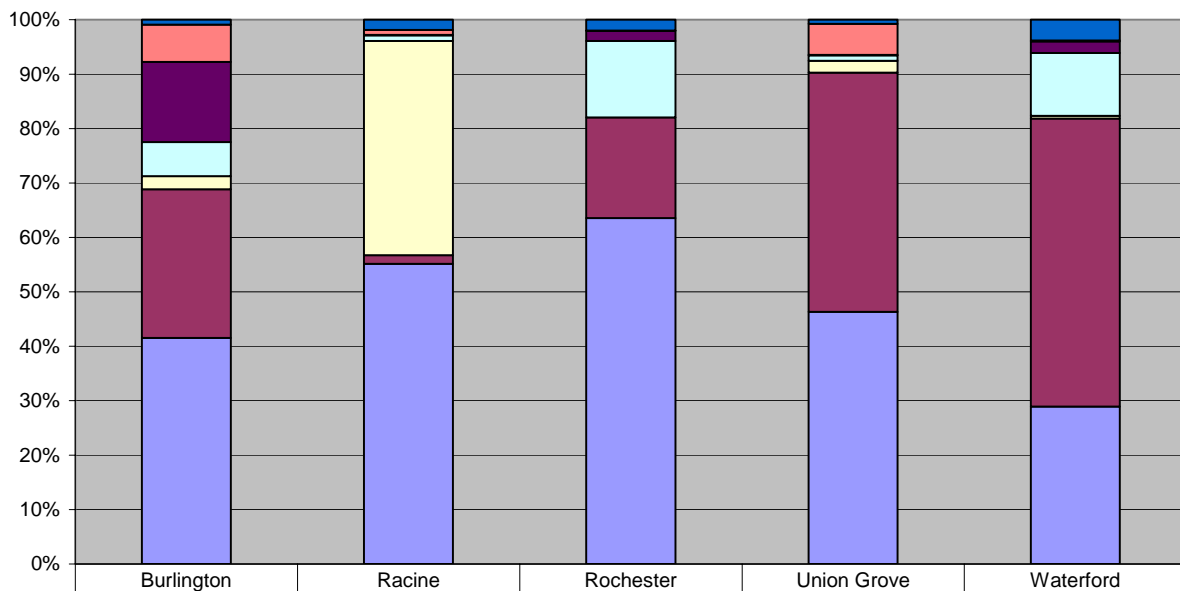
Consider that data here in conjunction with that shown in Figure 11, to get a fuller picture of library use patterns in the county.



## Figure 17. Racine County Library Circulation to Differing Population Groups

Libraries in the county tend to view non-resident borrowing issues in various ways depending on their own specific lending trends. Please remember that what does not show on this graph is the substantial use by Racine and East End non-library municipalities of Kenosha libraries or the use by West End non-library municipalities of Waukesha libraries. **Racine Public Library** officials tend to look only at the use made by city residents and that of the East End non library communities since that amounts to over 90% of the impact. **Burlington** officials consider West End non-library communities but even that accounts for only 70% of use. Burlington is heavily used by libraries in adjacent counties as well as by neighboring Waterford and Rochester. **Rochester** provides most of its service to home community residents, followed by service to West End non-library municipalities. A significant portion of Rochester's circulation is crossover circulation to Waterford, although Rochester users go to Waterford far more often than vice versa. Given its relative geographical isolation, **Union Grove** provides most of its circulation to either its own residents or to West End non-library municipalities. Union Grove accounts for relatively little crossover borrowing or lending but it does have significant use by Kenosha County residents. **Waterford** is the library most heavily impacted by non-resident borrowing. Most comes from West End non-library municipalities, with another significant piece being crossover borrowing, mostly to Rochester residents.

Library Circulation by Type



	Burlington	Racine	Rochester	Union Grove	Waterford
Other	1,745	18,967	381	407	5,842
Keno Co	13,368	9,253	15	3,048	257
Walw co	28,771	789	362	36	3,215
Crossover Lending	12,261	10,536	2,726	526	17,654
East End Non Library	4,669	396,791	-	1,186	777
West End Non-Library	53,325	15,696	3,607	23,478	80,743
Home	81,119	555,910	12,349	24,771	44,137

# Chapter 8. Proposed District Legislation

## Introduction

The Wisconsin Library Association's Library Development and Legislation Committee (LD&L) is seeking WLA member input on proposed district legislation. Consequently some of the elements of proposed district legislation may change from what is presented here. Nevertheless, it is a good summary of current intentions for legislation.

Because of the rapid changes in population and taxing patterns, the committee recommends support of Library District legislation that we hope will be introduced in the January 2005 session of the Wisconsin Legislature. The legislation will provide for an elected board in a designated district with taxing authority based on referendum.

Representative Kestell from the Sheboygan area had a bill drafted by the Legislative Reference Bureau, but it was not introduced in the last session. The state has funded grants to 6 areas of the state (Sheboygan, Ozaukee, Racine and Rock Counties; as well as Greenfield-Greendale and Menomonee area) to do planning for district library alternatives.

We hope to see legislation introduced early in the next session. For the LRB draft, see: <http://www.wla.lib.wi.us/legis/DistrictLeg.pdf>

Note that the LD&L committee sees major flaws in the LRB draft noted above and wishes to see the legislation contain the language and concepts included in this report rather than the specific language in the LRB Draft. Various SRLAAW and WLA Members reviewed legislation in other states for best practices regarding library districts. That review included legislation in California, Illinois, Idaho, Michigan, New York, Colorado, Arizona, and Texas.

We have been working on recommendations on district legislation for a long time. A subcommittee chaired by Racine Public Library Director Jessica MacPhail has also worked on recommendations.

## WLA's LD&L wants district library legislation to have the following characteristics:

### 1. Overview

- a. An elected 9-member board will have taxing authority for library services in the district.
- b. The district may be formed only along current municipal or county lines but may be formed by either petition of the electorate or vote of the governing bodies of the municipalities or county concerned.
- c. The boundaries of the municipalities included must be contiguous.
- d. At least one of the libraries forming the district must be at least five years old.
- e. The district must contain at least 4,000 residents.

### 2. District Prerequisites

- a. A proposed district would need a minimum population of 4,000.

- b. A proposed district would need to include a public library that had been established for at least 5 years.
- c. The Department of Public Instruction would be required to review the plan and issue a written opinion concerning the viability of the plan and whether it meets statutory requirement. The review would be advisory only.
- d. A petition referendum (as opposed to municipal board action only) should be allowed both for the formation of a district and for the increase of the maximum mill rate allowed.
- e. A public library district could include one or more contiguous municipalities.
- f. A public library district could include one or more contiguous counties.
- g. Protections for existing employees will be included in the legislation. No person employed by a participating public library, county library service or public library system, at the time of the establishment of a public library district shall lose, because of such establishment, any salary, fringe benefit or other employment rights in existence at that time.
- h. Retirement benefits need to be protected. If any employee of a participating employer under the Wisconsin retirement system becomes, by virtue of the establishment of a public library district, an employee of that library district, the library district shall become a participating employer under the Wisconsin retirement plan.

### **3. Planning Committee**

- a. The first step in the creation of a public library district will be the establishment of a planning committee.
- b. The planning committee may be created by an affirmative vote of each participating municipality or county. A petition of at least 10% of the electors in each participating municipality or county can also create it in the most recent gubernatorial election.
- c. The planning committee may consist of 7 to 11 members appointed by the governing boards of the participating municipalities or counties.
- d. The district library planning committee will develop a plan for establishment and initial operation of the proposed district public library.

### **4. Funding**

- a. The plan would include the initial property tax levy rate for the public library district. This rate will, at minimum, equal the three year average of previous library support provided by the proposed participant(s) to the public library district.
- b. Upon creation of the public library district, all assets and liabilities of each public library that becomes part of the district become assets and liabilities of the district.
- c. An increase in the public library district property tax levy rate would require approval by referendum.
- d. The legislation will allow for anticipation tax loans to use anticipated district taxes to cover known and planned start up costs for initiating a district. (Such as a transition to independent auditing, and personnel administration, and so on).
- e. The proposed legislation should include a provision that permits up to a five-year phase in of a district-wide tax rate, provided a specific schedule for the phase in of the tax rate for each political jurisdiction in the public library district is included in the initial district plan. This would be helpful in equalizing tax rates in areas where they are widely divergent. (Note that this may not be possible under Wisconsin law because of the "tax uniformity" provisions of the State Constitution).

### **5. Governance**

- a. A 9-member board elected by residents of the district area for staggered 3-year terms would govern district libraries. The plan would state whether board members would be elected at-large or by geographic sub-districts.

- b. The district board should be required to have an annual public hearing on the budget proposed by the district board.

## **6. Plan Requirements**

- a. The plan will provide for the method of transition from a current public library organization to a public library district.
- b. The plan will include a procedure for transferring employees and title to property and would address other necessary matters.
- c. The plan will specify the salaries, fringe benefits, and other employment benefits for each position in the proposed district.

## **7. Buildings**

- a. If a public library district is established, an existing public library facility cannot be closed by the public library district board for a minimum of five years from the date of the establishment of the public library district unless
  - a new public library facility is opened to serve the same area formerly served by the facility which is closed, or
  - the closing of the facility is specified in the initial plan for the district.
- b. A public library district board shall provide a municipality in which a public library facility is located two years notice of its intent to close the public library facility unless a new public library facility is to be opened in the same municipality.
- c. If a public library is currently located in a municipal building which is shared with other municipal functions, ownership of the building shall remain with the municipality. However, the municipality shall be required to lease the current space occupied by the public library to the new district public library for \$1 per year for a minimum of 10 years.

## **8. Plan Approval**

- a. If the final plan for creation of a public library district is approved by all of the governing bodies of all of the proposed participants to the public library district, the district would be created.
- b. If the plan is not approved by the governing bodies of all of the proposed participants to the public library district, the district could still be created by referendum in each municipality.

## **9. Single Municipal or Joint Library District Formation Options**

- a. If a single municipality, existing joint library, or consolidated county library board wants to establish a district, the existing public library board may serve as the planning committee.
- b. In a conversion process, the district library plan would be approved by a referendum of voters in the political jurisdictions currently served by the municipal, county, or joint public library as a whole.
- c. Individual jurisdictions currently included in joint libraries or consolidated county libraries will not be able to opt out of the proposed district library.

## **10. Multiple Library Community and/or Non-library Community Options**

- a. For a single municipal public library that has been established for a minimum of five years, the existing public library board will be able to establish a planning committee to develop a plan for establishing a district public library that would include the area served by the municipal library and one or more adjacent municipalities that do not have a public library. The planning committee must include representatives from the adjacent municipalities without public libraries.
- b. For two or more municipal or consolidated county public libraries that have been established for a minimum of five years and wish to form a district, the existing public library boards will

be able to jointly establish a planning committee. The committee may develop a plan for establishing a district public library that includes the area served by the two or more municipal public libraries and one or more adjacent municipalities that do not have a public library if the planning committee includes representatives from the adjacent municipalities without public libraries.

#### **11. Countywide District Option**

- a. A planning committee for a county-wide public library district for a county in which a county-wide public library does not currently exist may be established by a majority vote of a county board of supervisors or by a written petition that is signed by 10% of the electors.
- b. The planning committee for a county-wide public library district shall include at least one representative from each public library board that currently exists in the county.
- c. The legislation will provide that a county board may only create a countywide library district with the consent of EACH municipality with an existing library acting individually rather than by a plurality in a countywide referendum.
- d. Municipalities without their own libraries would be considered as a single entity for purposes of referendum in a countywide referendum.
- e. A public library district that includes 100% of the territory in a county may organized as a single county consolidated public library system under s. 43.24 (4) (a) and s. 43.21 of the Wisconsin Statutes. This would mean that a county district library board could be the system board under state law and receive state aid rather than having a separate system board.

#### **12. Mergers, Withdrawals**

- a. A municipality contiguous to an established public library district could join the district by affirmative vote of the public library district board and the governing body of the municipality, or by referendum in the existing district and in the contiguous municipality
- b. A municipality could withdraw from the public library district by referendum.
- c. The legislation will provide an orderly method for the merger of two or more districts into a single district. Such a merger can be by action of the respective district boards rather than via municipality-by-municipality referendum.
- d. If a municipality withdraws from the district, all assets and liabilities attributable to public library service within that municipality become assets and liabilities of the municipality.

#### **13. Statutory Authority of Districts**

- a. The legislation will give public library district boards the powers and authority delineated in Chapter 43 for municipal libraries. However, it is important that districts, like systems but unlike municipal libraries, have the power to sue and be sued.
- b. Legislation will permit district libraries that extend beyond county boundaries. The language needs to be consistent with current language in Wis. Stats. 43.53 addressing joint libraries.

#### **14. Some Expected Steps in Establishing a District Public Library**

1. A library planning committee representative of all municipalities involved formulates a plan which addresses the following:
  - a) The names of the municipalities that will be members of the joint public library.
  - b) The statutory authority under which the district library will be established.
  - c) The method of election for library board members, whether by at large or by geographic district.
  - d) The initial terms of office, which will be assigned to each board member seat, providing for staggered three-year terms.
  - e) The disposition of existing and future assets of the district in case of dissolution.
  - f) The method by which annual budgets will be formulated, provision for annual hearings, and an initial operating and capital mill rate. (Changes in future maximum mill rates must be by referendum).
  - g) If the proposed district territory lies in 2 or more counties that are not in the same system, the agreement must designate the system in which the district will participate.
2. Submit proposed plan to the governing bodies of each participating municipality for approval. Alternately, submit the proposed plan to referendum based on a petition of 10% of voters in the affected municipalities.
3. Submit proposed plan to the Division for Libraries, Technology, and Community Learning for an opinion regarding the desirability and feasibility of the plan. The Division's opinion will be contingent upon the following conditions:
  - a) The district will be established under the appropriate provisions of Chapter 43 of the Wisconsin Statutes.
  - b) A librarian who is eligible for the appropriate grade level of Wisconsin public librarian certification from the Department of Public Instruction will be appointed to administer the library.
  - c) The establishment of the district agrees with the long-range plan for library service in the county.
  - d) The joint library will be a member of a public library system.
4. Draw up legal referendum incorporating provisions of plan.

## Outline of a Sample Plan

Name of Proposed District	
Current budget of library	
Proposed first year budget of library [List participant amounts individually]	
Names of proposed participant municipalities	
Statutory authority for district	
System of which the district will be a member	
Grade level certification of director	
Required grade level certification for newly formed district.	
Method for election of trustees (at large or by geographic sub-district).	

1. **Executive Summary**
2. **Mission Statement.**
3. **Committee Membership** [list members of the planning committee that developed this document]
4. **Brief History Of Library Development.** [Provide a history of the library that is the basis of the proposed district library]
5. **Current Library Services.** [list current circulation, attendance, collection and other input and output data for the current library operation]
6. **Current Funding and Proposed Future Funding** [provide a summary of past funding for the library and anticipated future funding; noting any proposed new buildings]
7. **Provide Impact statement** [Indicate the impact that the proposed merger is projected to have on funding and usage patterns in the county and/ or the system. Include letters or reports from the system and the county on feasibility.]
  - a. Relations With Other Libraries.
  - b. Funding formulas
  - c. Library System Opinion on Feasibility
  - d. County Opinion on Feasibility
8. **Tax Base of All Municipalities** [Provide a current summary of the tax base (State Equalized Valuations) for the participants in the proposed district over the last several years]
9. **Standards For Libraries** [Provide a listing of how the current and projected district library compare to the numerical requirements for state and county library standards]
  - e. State
  - f. County (if any)
10. **Buildings.** [Describe the building in which the district library will be housed. Include relevant data regarding square feet, collection capacity, parking, and so forth. Also indicate how the physical assets will be distributed in the event of dissolution]
11. **Contracts, Bylaws, etc.** [Attach copies of proposed bylaws and contracts. Indicate whether they have been reviewed by the relevant municipalities, county board and the library division]

### **Library District Pros**

Even though only 20 states provide for district library organization there is evidence that this type of organization results in substantially better service and increased accountability to the public in those states. It is unlikely that there will be a mass conversion to districts if district law outlined in this report is passed. Some of the positive things that could develop from public library districts are:

1. Economies of scale and uniform taxation over wider units of service.
2. Direct participation by voters over the size, funding and governance of libraries will usually lead to better services and enhanced taxpayer satisfaction.
3. Equity of funding for both operating and capital budgets will be achieved over a wider number of jurisdictions.
4. Public library districts could offer a solution to the often troublesome conflicts over the difference between library board and municipal powers.
5. Public library districts offer a better alternative to the current joint public libraries which have some limitations because of the need to satisfy the sometimes divergent views of two or more municipalities.
6. Public library districts provide an alternative to some current county library configurations.

### **Library District Cons**

Larry Nix, the consultant in the Rock County review of library districts notes the following for negative aspects of library districts:

1. Forming a district library means that the library board will have to take on all of the responsibilities of an independent governing body. Many library boards would be unwilling to do this.
2. The library administration and staff will be required to perform many tasks currently performed by local government. This isn't reasonable for most small public libraries in Wisconsin.
3. Some of the major service benefits of public library districts would require the consolidation of multiple libraries. This would be a difficult sell to many communities.
4. Requiring that public library board members run for office would be unacceptable to many current public library trustees.
5. In some cases public library districts might actually increase the problem of crossover borrowing.
6. Formation of a district public library in a county could reduce the county funding available to reimburse other libraries for non-resident borrowing.
7. It will be difficult to convince voters in municipalities without libraries to join a district library if it means additional taxes.
8. Issues relating to staff benefits and security may pose an obstacle.
9. Ownership of library facilities would be transferred to the public library district. This could be a problem for some communities.
10. The public library district would take on any capital debt. This could be viewed as a negative in some cases depending on the amount of debt involved.

# Chapter 9. Background Reading

## Are Wider Library Units Wiser?

On October 30, 2003 at the Wisconsin Library Association Convention, Milwaukee. Thomas J. Hennen, Jr., Director, Waukesha County Federated Library System presented a paper on Wider Library Units.

The PowerPoint presentation is available the web at:

<http://www.haplr-index.com/What'sNew.htm>

### Abstract:

What form of organization delivers the best library service? In an article, "*Are Wider Units Wiser?*" published in the June/July 2002 issue of **American Libraries**, Hennen states "Although they serve 21st century users, most of the 9,000 library units in the U.S. are built on 19th century tax bases and use 20th century service assumptions."

Hennen calls for research on whether wider units of library service provide superior services. Library trustees, library administrators, municipal officials and the public all need to reexamine assumptions regarding libraries in order to remain viable. We cannot compare how well a library may have fared had its planners chosen a different road in the past. We can only compare the results for the roads taken by other libraries in different areas of the country, hoping that the comparisons will help library planners choose wisely in the future.

Hennen's entire article can be found at

[http://www.haplr-index.com/Wider\\_Wiser.htm](http://www.haplr-index.com/Wider_Wiser.htm)

## Kansas City Consensus

***Kansas City Consensus***, a non-partisan independent public interest research firm, has just concluded a year long, in depth study of twenty first century library needs in the greater Kansas City area. The full Kansas City Consensus report, along with the executive summary will be available on the web at [www.kcconsensus.org](http://www.kcconsensus.org) after the press conference on April 20, 2004. There will be wide interest in the report around Kansas City and among the wider library audience nationally.

The author of the report is ***Jennifer Wilding***. She interviewed key library stakeholders and devoted thousands of hours to researching the topic for Kansas City Consensus. Her broad ranging and thought provoking analysis will challenge KC metropolitan citizens to examine their library past and present in order to create the best possible library future. Objective is the byword of the KC Consensus analysis.

[JenWilding@aol.com](mailto:JenWilding@aol.com)

**Thomas J. Hennen Jr.** served as a consultant for KC Consensus on this project. He is known widely for HAPLR (Hennen's American Public Library Ratings). Hennen provides historical perspective and professional judgment to the KC Consensus report. He also provided statistical comparisons to KC Consensus about the strengths and weaknesses of the four major and two smaller library systems in the KC metropolitan area.

[thenen@haplr-index.com](mailto:thenen@haplr-index.com)

### **Joint Library Issues for Wisconsin Libraries – Report**

This 30 page pamphlet was prepared by Waukesha County Federated Library System Director Tom Hennen in 2002. This paper provides background information on joint library issues in order to help communities determine the feasibility and desirability of establishing a joint library. The site is at:

<http://www.srlaaw.org/documents/JointLibrary.pdf>

### **Further Statistical References**

#### **State Statistics from: Wisconsin Division for Libraries, Technology, and Community Learning**

The Public Library Development Team annually collects statistics from the state's public libraries. Excel files of the statistics for 1996 - 2002 are listed below. (You need the Excel version for Office 97 or later to view the data.) Note: The 2003 statistics are available.

[http://www.dpi.state.wi.us/dpi/dltcl/pld/lib\\_stat.html](http://www.dpi.state.wi.us/dpi/dltcl/pld/lib_stat.html)

#### **Federal State Cooperative System – National Data**

Nationwide public library statistics are collected and disseminated annually through the Federal-State Cooperative System (FSCS) for public library data. Descriptive statistics are collected on nearly 9,000 public libraries identified in the 50 states, the District of Columbia, and the outlying areas.

<http://nces.ed.gov/surveys/libraries/surveyPUB.asp>

#### **Hennen's American Public Library Ratings**

This site rates public libraries in the United States based on the latest data from almost 9,000 U.S. libraries as reported to the Federal State Cooperative System. This is the fifth edition of the ratings. Libraries are rated, scored and ranked on 15 input and output measures. The latest (2001) public library statistics were published by the National Center for Educational Statistics in July of 2003.

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