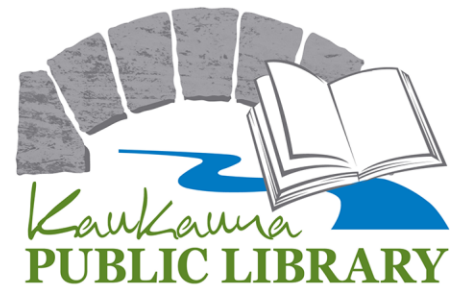


To: Kaukauna Public Library Board of Trustee
From: Library Director Ashley Thiem-Menning
Date: 1/20/2026
Re: OWLS Updates



On Friday, November 21, 2025 AAC voted to migrate to Polaris & Vega from TLC's CARLX product. Work for this transition has already begun. The timing of this is rather difficult as OWLS is also working to pull data for us for the 2025 DPI reports, which are required to be filled with the state prior to February 28. We have also started to see some work on our end as well in preparation for the migration. In December we were asked to go through our location codes and determine whether we want the code, and if we need any of the text in the location code changed. I went through the list and found a significant number of errors, which are a human byproduct of adding thousands of records over the years. I was able to clean up and transfer items back to their correct location, so that several codes could be deleted from our list because we do not use them.

One of the positive changes with Polaris is that each unique library login will now only display that libraries' location/collection codes. Currently, every single code used by all 49 libraries shows up when we catalog a book, which is why errors can occur. There are just shy of 300 codes total, which are just a string of letters meant to denote the location. Examples: ANONF, ANTVAC, ANTVAR, ANWRD, ANWTC. We also have several codes that we will be adding for migration, and then we will need to change items by hand into the new code. This is helpful for patrons when they are looking for items because the codes will be displayed properly in the catalog.

Between April and August, we will have circulation and cataloging onsite and online training. One person from each library will be selected to receive the in-person training and they will then teach their library staff the procedures. James, our Adult Services Librarian, has been selected as the staff member to receive this training for KPL. Training on acquisitions will begin in June. This procedure alone will be a big learning curve for KPL. Due to the current software being problematic, we opted not to order through our ILS. Simply put, some libraries place their vendor order through the ILS and then their items display as "on order" in the library catalog. When you don't place your order through the ILS, you don't see those items in the catalog until you manually scan them in and add them. This is helpful because it allows patrons to see what we have purchased and place a hold on it before it arrives, and it can influence high demand holds and how many copies of a title need to be purchased. We will be changing this practice when the new software goes live so that KPL items will display as on order in the catalog going forward when we purchase.

OWLS will begin testing in July. The final data extraction from CARL will be in August. The day selected will mean that most functions besides checking out materials will not be able to be completed and InfoSoup will be down. The current go live date for Polaris, Vega, Program, and Mobile software products is August 19. When we selected staff training dates in the fall of 2025, we did not have this timeline, as a vote had not yet gone through about migrating to new software. We do have a staff training day on May 8. We are hoping that

the day can be dedicated to learning the new ILS as a group. This will also be a new challenge because not all our on-call staff can attend these full-day trainings due to other work obligations. We will have to dedicate additional time to ensuring that they have time for training as well.

In terms of the go-live date, we are uncertain as to how that will be handled. The last time we transitioned software was the height of the pandemic and many libraries were open, but operating under service restrictions, so the flow of traffic was quite low compared to going live during the summer. Luckily, Summer Library Program is typically finished by the go-live date that has been selected.

On top of the ILS (software we use for circulation functions) we are also getting a new Discovery Layer, called Vega, which is what InfoSoup search catalog is now. It will still be InfoSoup and OWLS branded, but the data will be displayed using their Vega product, which is an improvement. We are also getting a new mobile app as well. Staff will also have to learn the new software calendar and have it embedded into the website, as well as embed and learn the new meeting room and study room software package. Lastly, Polaris has the capability to remote call patrons for holds, which we believe to be part of the software package. Staff currently must watch a screen and handwrite phone numbers and then make calls, so the error level shifting this to automated calls would be a real time-saver and should cut down on human error. This is going to be the largest learning curve I have seen in the OWLS system in the 18 years I have worked in it. But we are extremely grateful to OWLS for navigating this migration with us and are thrilled to have some of the new capabilities of the software selected.

Other OWLS news comes in the form of Overdrive/Libby. It is no secret that the waiting times in Libby are long. Library lingo to know: WPLC, Wisconsin Public Library Consortium, which is the entity that purchases, manages and provides access to digital content. We pay WPLC annually; every public library/system in the state pays for this service based on a funding formula, which is based on a three-year average of OverDrive usage and local collection expenditures. Overdrive is the vendor or digital library interface. Libby is the name of the app that OverDrive uses for its products, which are e-books, e-audio, and e-magazines. An Advantage Account is an account that a library system has within OverDrive that is exclusive and locally purchased, meaning only cardholders within that system have access to the extra Advantage copies purchased.

OWLS recently completed an audiobook pilot project where they put almost 50K into our OWLS OverDrive Advantage account. The goal was to see if the funds would cut down the current hold times. They were able to reduce the wait time from a high of 84 days to 72 days. As you can see, 50K was able to make a dent in the wait time but still leaves long waits. Since electronic media, specifically e-audiobooks, continues to grow at a rapid rate, OWLS has started discussions and formed a committee to investigate having member OWLS libraries match their WPLC purchasing pool requirement in a phased in multi-year approach to spend on Advantage Accounts. Adult Services Librarian James is currently serving on that committee to represent libraries that also offer Hoopla, as it plays a role in electronic resource funding.

While we did not exactly see the request for a match coming, we have been aware since we started our last Strategic Plan that we must start allocating additional funds to electronic materials due to their growth rate. This essentially means we begin to shift our purchasing to a better balance between print and electronic materials. Since the creation of the library strategic plan, we have been spending shy of \$100 a month on Advantage account titles. Staff run a report to see what items have the most Kaukauna holds and then we purchase an additional copy for the OWLS Advantage Account. Knowing that this increase is likely to come and is necessary to be more equitable to the libraries in our system that are already adding funds into our Advantage accounts, we plan to be more aggressive to shift our spending monthly, so that we are ready to shift our allocation to match in the future without feeling a major hit to our print material line.

KPL agrees that this does need to happen because the current practice is inequitable and hold times in Libby are very frustrating for patrons. Libraries per OWLS policy are not required to purchase any Advantage account items, but all OWLS cardholders technically benefit when we add titles to the Advantage account. Some libraries put a significant amount of money into the Advantage account, like Appleton, and we have been benefitting from it for years. We are credited back for some of the electronic circulations from our cardholders in the county allocation funding formula when we do spend this money on electronic titles in OverDrive. Further, there is clear patron demand for these electronic materials, so we are also meeting the needs of our patrons. This does have the potential to possibly slow Hoopla expenditure in the future if we are better at meeting the needs of patrons for electronic materials within the state consortium. We currently utilize Hoopla because it is an instant model versus a license-based model and patrons love it.

In 2026, our share of the WPLC buying pool is \$5807, up \$595 from the prior year. Within three years, we may be looking at a buying pool around \$7,592 based on the increase experienced from 2025 to 2026 and we would need to match that in Advantage Expenditures bringing our total expenditures with WPLC to roughly \$15,000. When that occurs, we will balance Hoopla expenditures with the WPLC expenditure based on collection use to spend more balanced between print and electronic usage.

We ended the year with OverDrive increasing 14% and Hoopla increasing 6% in circulation. Roughly one fourth of our circulation was electronic material in 2025 and spending on electronic materials was only roughly 17%, which means we need to ensure moving forward that we are allocating closer to one fourth of the materials expenditure line on electronic materials.

Physical circulation was up 3%, which is actually pretty amazing considering the largest library in our system opened their brand new library this year. While they were closed for renovations, many of their patrons utilized our library, increasing our statistics over the course of the last two years. When large libraries open, the smaller area libraries typically see a drop in their statistics because of so many patrons going to the new larger library to see it. Luckily, we were able to end the year on a positive note with our physical circulation. This means that we should see another increase in county allocation revenue.

Lastly, OWLS has started a Substitute Library Assistant program. The pay would be \$18 an hour, and OWLS would charge the libraries \$15 an hour and cover the extra \$3 for mileage reimbursement over 10 miles. This is based on a successful Winnefox Library System program. Currently, OWLS employs two subs. In a scheduling emergency, this may be another option for us to consider.

