



Strategic Plan
2020-2024

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INTRODUCTION

The Milwaukee County Federated Library System was founded in the early 1970s and has grown throughout the years to meet the unique needs of member libraries. In the 1970s the idea of using a mobile device to access an online library catalog of nearly 5 million items would have been unheard of, but today it's the norm. This is just one example of how patron and library expectations have evolved and why strategic planning is so important.

The recently completed Public Library System Redesign (PLSR) process has demonstrated that, now more than ever, library systems need a plan to stay relevant and respond to evolving technological and social conditions to meet the needs of member libraries and their communities. MCFLS has tremendous opportunities right now to leverage resources for member libraries through connection, collaboration and advocacy across the state.

This strategic plan is the result of many hours of contemplation, reflection and discussion to determine how MCFLS can best serve our members in the most efficient and effective ways possible given our current environment. I want to personally thank the MCFLS staff, our trustees and member library directors for the substantial time and effort in helping put this plan together.

This plan provides us with a roadmap for the next five years, but MCFLS will need to remain responsive and innovative to meet the needs of our libraries even with this plan in place. The 2019 ALA theme for National Library Week was Libraries = Strong Communities. Our obligation at MCFLS is to help create and sustain the environment where our libraries and communities throughout Milwaukee County may thrive and continue to grow stronger. With this strategic plan to guide us, MCFLS will continue to connect and evolve to the benefit of our libraries and patrons.

Steve Heser, MCFLS Director

OVERVIEW

This plan was developed over six months and is a result of a collaborative effort of Milwaukee County Federated Library System member libraries, board and staff. MCFLS thanks all of the library directors, MCFLS board trustees and system staff for their time, effort and thought to help us create the MCFLS Strategic Plan. The input and feedback from all was invaluable.

In September 2018, MCFLS hired WiLS (Wisconsin Library Services) to develop and facilitate a system strategic planning process. The process, started in November of the same year, relied on a System assessment of the last plan, survey data, and information gathered at a full day in-person meeting with member library directors, trustees, and system staff.

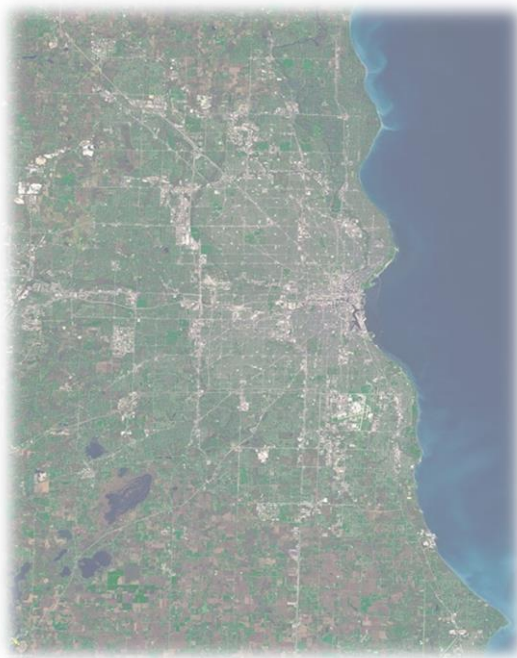
The first survey, administered to MCFLS libraries from November 26 to December 7, helped identify needs and priorities of member libraries. 14 libraries responded to this survey. The second survey gathered information and helped gain understanding of the impacts of last system plan and where the system can and should help libraries achieve their service priorities. This survey was administered to system staff and trustees and member library directors from January 7 to January 23, 2019. There were 22 respondents, including 15 from member libraries.

On February 28, 2019, an all-day strategic planning meeting with member library directors, MCFLS board trustees and system staff was held at the UW-Milwaukee School of Continuing Education. WiLS facilitated this meeting, which reviewed the results of the surveys and identified member library service aspirations. This information and discussion led to the participants identifying potential strategic directions, service goals and initiatives for MCFLS.

From the information and ideas gathered during the planning meeting, MCFLS staff, with assistance from WiLS, developed a draft framework of strategic directions, service goals, initiatives and activities including identifying necessary resources and a timeline. A draft of the strategic plan was provided to the MCFLS Library Directors Advisory Council (LDAC) and MCFLS Board for further feedback. With this input, the final draft of the plan was completed and presented for approval by the MCFLS board at their May 20, 2019 meeting.

MISSION

MCFLS provides collaborative leadership, advocacy, and support for high-quality resources and services to empower the capabilities and capacities of member libraries to deliver responsive and innovative library services to all residents of Milwaukee County.



VISION

MCFLS and member libraries envision themselves as indispensable resources and vital partners providing access to a coordinated network of information, exceptional library experiences, and life-inspiring opportunities.

MCFLS STRATEGIC PLAN

Strategic Direction I: Technology

Ensure member libraries are supported with a high-quality and innovative technology infrastructure and flexible training to provide the best possible online and in-library technology user experience.

Service Goal A: Training

Develop technology training opportunities, tools, and resources that accommodate a variety of needs and provide common system-wide learning experiences.

Objectives

1. Increase in the use of system-provided technology trainings and learning resources by member library staff at all levels at member libraries
2. Decrease in the duplication of the development of technology training tools and resources by member libraries

Assessments

1. Annual trainings provided by MCFLS staff and attendance report
2. Use of instructional resources
3. Feedback from member libraries

Initiatives and Activities

1. Create a variety of easily accessible and usable training opportunities and resources for member library staff based on input from libraries to understand what works for them
 - a. Survey libraries to determine training needs
 - b. Identify and provide web-based training opportunities
 - c. Create short videos and instructional content that is practical, task specific, and related to system-wide ILS, digital resources, and technology member libraries and patrons use
 - d. Develop train the trainer opportunities to increase technology expertise at member libraries
 - e. Offer regular technology “office hours” or “Q&A’s” for real time access to one on one and group learning assistance
2. Further develop Knowledge Base with technology related information
 - a. Provide up to date tracking of changes, with regular reviews of the different resources, to existing technology, platforms and resources such as Hoopla, Baker & Taylor and Overdrive.
 - b. Develop and provide plug and play instructions for patrons’ use of technology, ILS, County Cat app, and online resources that libraries can use (ex. MCFLS Spotlight)

Resources

1. Staff time to learn, develop, and do
2. Potential funds for needed professional development
3. Potential funds for platforms or subscriptions

Service Goal B: User Experience

Decrease barriers to access and improve usability of system provided online resources and technology platforms.

Objectives

1. Improve County Cat app
2. Increase commonality of online resources available to libraries system-wide
3. Develop future plan to evaluate ILS platform
4. Increase in commonality of circulation policies among system member libraries

Assessments

1. County Cat app feedback
2. ILS feedback
3. Commonality of county-wide online resources and use of those resources

Initiatives and Activities

1. Improve County Cat app to include an updated, modern and responsive design.
2. Continue to increase continuity of online resources across the system and accessibility (remove barriers) to online resources
 - a. Identify accessibility issues for users and develop strategies and solutions to improve
 - b. Continue to identify new opportunities and needs for system online resource subscriptions
 - c. Shift financial resources so that all libraries have access to the same resources.
3. Assess the ILS and discovery of all available online resources
 - a. Develop an ILS evaluation plan that studies how well Sierra is or is not serving member library and/or patron expectations and gathers information about other ILS options
 - b. Keep discovery layer relevant
4. Develop and facilitate a process to review circulation policies to identify potential areas for standardization throughout the system to increase ease of use of county libraries by patrons
 - a. Identify and compile system-wide data, including gathering feedback from users, that could inform standardization discussion and decision making
 - b. Use the existing LDAC meetings for these discussions

Resources

1. Funds for development of platforms and subscriptions to resources
2. Staff time

Service Goal C: Infrastructure and Innovation

Continually strive to support member libraries ability to provide relevant and up to date technology to their users and provide leadership to identify library technology needs for the future.

Objectives

1. Standards established and transparent to member libraries with the result of more up to date technology in libraries

2. Increase in savings of time and money to the system and member libraries related to technology equipment purchases and projects
3. Annual report that provides summary and assessment of future-facing technology activities led by the system

Assessments

1. Age of technology equipment in the libraries
2. Technology equipment expenditures by system and libraries
3. Report of activities pursued and completed each year

Initiatives and Activities

1. Establish standards related to technology equipment and assist members with technology life cycle planning
 - a. Identify and share best practices to establishing a library technology plan
 - b. Develop and share equipment replacement schedules
 - c. Develop and share recommended hardware lists
 - d. Develop and share recommended browser, PC, and printer settings
2. Leverage economies of scale and buying power to benefit all libraries and library users
 - a. Cooperative purchasing of equipment for member libraries
 - b. Shared servers for printers and PC management services
3. Provide leadership in trend spotting and technology project development
 - a. Identify and manage large-scale project opportunities for scale shared technology project, including investigating opportunities at ALA and through statewide and LDAC discussions
 - b. Provide timely and regular environmental scans to identify potential and emerging technology trends
 - c. Vet and test potential new technologies for libraries
 - d. Connect more with other library systems to share technology ideas
4. Create annual report that includes activities related to technology and current equipment hardware lists and recommended settings.

Resources

1. Staff time
2. Potential funds for system funded and managed equipment and projects

Strategic Direction II: Communication

Provide voice and visibility for the system, its member libraries, and county-wide services and resources to broadly communicate the value and opportunities MCFLS libraries provide to our communities.

Service Goal A: System Marketing

Promote system-wide resources and services in a variety of ways with consistent and targeted information and communications.

Objectives

1. Identify insights about Milwaukee County residents' needs
2. Increase awareness and use of system-wide and member library services and resources

Assessments

1. System-wide survey of residents
2. Service and resource usage data

Initiatives and Activities

1. Create a marketing and advocacy committee made up of library and outside experts
2. Re-develop the existing system marketing plan to include the following:
 - a. Identifying current and new data collection priorities to support marketing development and implementation including utilizing tools (surveying system residents, focus groups, market segmentation, GIS mapping, methods to capture user stories, etc.) as appropriate to gather and analyze system-wide data
 - b. A targeted plan for marketing system-wide services and resources to different audiences through various communication channels with a focus on reaching underserved populations and those that do not or infrequently visit and use our member libraries.
 - c. Providing and centrally maintaining standardized, easy to access, and easy to use (plug and play marketing toolkits) marketing messaging, information, and materials for system provided resources and services
3. Develop a plan to regularly communicate to member libraries what the system is actively doing to meet library market and meet member and county resident needs for system services and resources.
4. Collaborate with other library system and statewide marketing and related data gathering efforts

Resources

1. Staff time
2. Marketing materials
3. Potential additional internal capacity via an intern to assist with system marketing development activities
4. Potential outside expertise for marketing plan development and implementation including data collection and/or surveying

Service Goal B: Advocacy

Be a strong proponent for the successful support of MCFLS and its member libraries at the local, regional, and state level.

Objectives

1. Strengthen and increase community, county, and state support for MCFLS and member libraries

Assessments

1. State, county, and local funding
2. Number of system and local level grassroots supporters/advocates
3. Active Friends Groups and Foundations
4. System-wide survey of residents

Initiatives and Activities

1. Create a marketing and advocacy committee made up of library and outside experts
2. Develop a system-wide advocacy and engagement plan to develop support for the system and member libraries that includes the following:
 - a. Identifying current and new data collection priorities to support advocacy efforts including utilizing tools (surveying system residents, focus groups, methods to capture user stories, etc.) as appropriate to gather and analyze system-wide data
 - b. Creating an ongoing advocacy engagement and communication plan to build relationships and support for the system and its member libraries for a variety of audiences (legislators, local Friends groups, community as whole, etc.) with a focus on the impacts of libraries in the county, region, and state
 - c. Providing and centrally maintaining standardized, easy to access, and easy to use (plug and play advocacy toolkits) advocacy messaging, information, and materials for the system and member libraries
 - d. Providing advocacy training for system and library staff and boards
3. Develop a plan to regularly communicate to member libraries what the system is actively doing to advocate for the system and member libraries
4. Collaborate with other library system and statewide advocacy and related data gathering efforts

Resources

1. Staff time
2. Advocacy materials
3. Potential outside expertise for data work and/or advocacy engagement and communication planning

Service Goal C: Library Marketing

Provide the resources, tools, and opportunities for member libraries to develop and implement marketing plans

Objectives

1. Increase in available common marketing resources and tools for libraries
2. Increase awareness and use of local library services, programs, and resources

Assessments

1. Survey of awareness of local library services, programs, and resources
2. Services, programs, and resources usage data

Initiatives and Activities

1. Gather and compile data, information, and stories to use for local library marketing to identify priorities, audiences, messages, and metrics
2. Develop marketing plan support
 - a. Create a marketing plan toolkit
 - b. Help libraries connect with experts in the community for help (library schools, marketing experts at local companies, etc.)

Resources

1. Staff time
2. Marketing materials
3. Potential additional internal capacity via an intern to assist with library marketing support development activities
4. Potential outside expertise for marketing plan toolkit development and implementation

Strategic Direction III: Member Library Management and Services Support

Connect members to each other and to information to encourage collaboration, sharing, and collective learning; improve and innovate library services; and provide tools for effective operational and strategic decision-making.

Service Goal A: Data Collection and Utilization

Enrich system and member library decision-making through better and expanded data collection and dissemination and improving use of available data.

Objectives

1. A defined list of data collection priorities
2. Standards for data collection
3. Increase and improve access to and use of data by the system and member libraries

Assessments

1. Dashboard use statistics
2. Use of other data (not on dashboard) that is available to member libraries
3. Training provided and attendance

Initiatives and Activities

1. Lead and facilitate the standardization of data collection
 - a. Establish data collection priorities including review of current data that is gathered and new data that could be gathered such as salaries and benefits, money for suburban library renovation, in-house circulation by municipality (hourly and by day), reference question, room use, who is using the library remotely versus physically etc.
 - b. Establish standard collection tools and equipment (wireless access points, etc.)
 - c. Work with member libraries to determine standards for a variety of useful data points such as salary data, annual data reporting, etc.
 - d. Find management products to help maintain data collection standards such as Gimlet for reference statistics or Edge Report for computer use analysis
 - e. Educate member libraries on standards
2. Seek, develop, and engage in collaborative opportunities related to gathering and using data regionally and statewide, including gathering data from other metropolitan areas in the country
3. Investigate options to enhance MCFLS dashboard (or other data visualization tools) to include:
 - a. Additional data points such as by year ranges and community size
 - b. Include additional data tracked through annual report work such as budget levels, hours, staffing numbers, collection spending, etc., and new data that is prioritized to be collected.
4. Identify ways to improve use of data by the system and member libraries
 - a. Develop system level packaged data, analysis, and summaries to provide plug and play information that can more easily be utilized for decision making.
 - b. Explore new tools and software for gathering, compiling, visualizing, and analyzing data
5. Identify training needs of members and develop and deliver training related to understanding data and using data tools and software

Resources

1. Staff time
2. Potential funds for data aggregation and analysis tools and software
3. Potential additional internal capacity via an intern to assist with data collection and compilation
4. Potential outside expertise for data collection, training, analysis, and development of packaged data

Service Goal B: Connections and Coordination

Provide coordination and connection opportunities and organization to support and guide member library and system initiatives, resources, programming, and services, and facilitate members sharing and learning sharing with each other.

Objectives

1. Decrease library staff time dedicated to and the duplication of the work related to the goal
2. Improve collaboration and sharing by member library staff

Assessments

1. Library staff time

Initiatives and Activities

1. Review and redevelop system committee structure and communities of practice to support system and member needs, including identifying and developing areas for system coordination and support for member library YS and inclusive programming needs.
2. Develop and coordinate, as needed, county-wide programming and services, (ex. memory cafes)
3. Promote and support grant opportunities including support for grant writing, acting as a fiscal agent, and connecting with others that are seeking grants or grant partners
4. Develop an online space to serve as a clearinghouse with lists and resources that members could update and add to that would include information such as:
 - a. Ideas and contacts for staff in-services
 - b. Member library job opportunities
 - c. Sharing program ideas, best practices, and contacts
 - d. Performer lists

Resources

1. Staff time

Strategic Direction IV: Organizational Support and Structure

Strengthen the core foundations for the delivery of system services to ensure MCFLS member libraries are supported and positioned to be successful.

Service Goal A: System Interests

Engage regionally and statewide to represent and advocate for system interests.

Objectives

1. Active participation in statewide efforts to improve library systems and services

Assessments

1. System resources, staff and funding, to support services to meet member library needs

Initiatives and Activities

1. Engage in statewide efforts, including any implementation activities related to the PLSR Steering Committee recommendations, that will impact funding, legislation, and services to systems
 - a. Provide leadership where appropriate
 - b. Engage with regional partners to explore ideas and models developed by PLSR workgroups that can improve service to member libraries
2. Be informed and an active partner with other library systems

Resources

1. Staff time

Service Goal B: Funding

Assess the use of state funds and the impact of funding allocations on services.

Objective

1. Align funding allocations to best support system services and strategic plan initiatives and activities.

Assessments

1. System budgets
2. Reciprocal borrowing analysis report

Initiatives and Activities

1. Based 2020-21 state aid funding, realign budget allocations as needed to support system services and strategic plan initiatives and activities
2. Analysis of Reciprocal Borrowing
 - a. Establish guidelines for process and discussion
 - b. Perform data collection and analysis

Resources

1. Staff time

Service Goal C: Operational Support and Alignment

Meet the ongoing evolution of the needs of our member libraries and MCFLS services by aligning and supporting the development of staff skills and knowledge.

Objectives

1. Funding and staff capacities meet operational and strategic plan needs

Assessments

1. Updated job descriptions
2. Updated roles of staff shared with members

Initiatives and Activities

1. Make necessary annual budget adjustments to fund strategic plan activities and needs
2. Analyze staffing levels
 - a. Review job descriptions
3. Clarify and disseminate information about the roles of MCFLS staff
4. Staff learning support
 - a. Project planning and management

Resources

1. Staff time
2. Funding for additional staff training

Implementation

The MCFLS Director and staff will work in conjunction with the MCFLS Board of Trustees to prioritize service goals and initiatives for implementation. The system will consider available resources, including funding and staff time; changing conditions locally, regionally, and statewide; and opportunities that arise to innovate during the implementation of the plan.

The ongoing planning process for the system will include project management, assessment, communication, and re-prioritization of goals and initiatives to ensure the goals of the plan are realized with flexibility to adapt as needed.

In regards to assessment, the system recognizes that more detail regarding metrics for measuring progress and success toward goals to reach objectives is needed. As part of this, staff, with input from the system board and member libraries, will identify data that will be used to measure progress toward objectives as part of planning the implementation of initiatives. When data does not currently exist to establish baseline metrics for assessment, the system will determine what measurements or data collection can be done to identify metrics as appropriate and possible. Based on metrics identified for determining success for any objectives, the MCFLS Director and staff will seek input from the board and member libraries, as needed, to identify levels of measureable improvement that will help with determining the success in meeting objectives.