2015-2020 MCFLS Technology Plan

Introduction

The Milwaukee County Federated Library System (MCFLS) is a consortium of public libraries representing all 19 Milwaukee County municipalities (15 autonomous library boards) and serves a population of approximately 950,000 from 28 physical locations. On behalf of all its members, MCFLS administers a shared automation system (CountyCat), featuring Innovative Interfaces Inc. library application software.

The MCFLS data communications network is a wide-area network (WAN) of 15 locations (14 suburban libraries and the MCFLS offices). The central site (MCFLS Main Office) hosts an ILS server, delivering Innovative Interfaces, Inc. library application software to each of 14 suburban library local-area networks (LANs) via 200 Mbps (as of 06/03/14) WAN Service. The Innovative Interfaces, Inc. library application software is also delivered to the Milwaukee Public Library WAN via an ethernet connection running from the MCFLS office to the MPL computer room. From there the feed is forwarded to all Central Library departments and the 12 MPL Neighborhood facilities. Suburban locations receive Internet services from a MCFLS-contracted ISP via 200 Mbps (as of 06/03/14) Internet service. Email and Website hosting services are also provided by MCFLS Microsoft Windows Servers. The Whitefish Bay Public Library network is outside the MCFLS WAN – following the MPL model, but still receives CountyCat via 5 Mbps WAN service.

This Plan was developed by the MCFLS Technology Unit and Administrative staff, with additional input and critique of provided by the Library Directors Advisory Council (LDAC), the MCFLS Board, and other relevant parties.
The 2015-2020 MCFLS Technology Plan includes ten goals:

1) To insure that the wide area network (WAN) infrastructure of MCFLS and the network structure of its member libraries meet future growth demands in light of changing technological advancements.

2) To expand and improve the integrated library system (ILS) functionality to meet the needs of users and staff.

3) To facilitate and expand resource sharing among all libraries inside and outside of Milwaukee County.

4) To enhance the MCFLS website as well as host member library websites.

5) To facilitate MCFLS and member library participation in the Wisconsin Public Library Consortium (WPLC) digital download media buying pool.

6) To help purchase and/or broker purchases of online content delivery products.

7) To assist member library staff in becoming more technologically knowledgeable and proficient.

8) To maintain and enhance MCFLS technology staff professional competencies.

9) To organize and maintain all appropriate automation product licensing and technical documentation.

10) To insure adequate funding for the Technology Plan.
GOAL 1

To insure that the wide area network (WAN) infrastructure of MCFLS and the network structure of its member libraries meet future growth demands in light of changing technological advancements.

Objective 1.1. Improve the current central site server environment.

Activities

a. Maintain and/or upgrade Windows servers (hardware and software) to the latest essential technology, i.e. identifying and implementing any required hardware, service packs, hot fixes, and new software releases. (2015-2020)


c. Maintain essential hardware and software to provide an efficient methodology in controlling (remotely) central site Windows servers and network equipment. (2015-2020)

Objective 1.2. Improve the MCFLS network connection and provide administrative oversight of the MCFLS network.

Activities

a. Explore and implement essential solutions to improve network performance on the MCFLS wide area network (WAN) and the Internet in anticipation of increased bandwidth available through the TEACH program as soon as 2015. (2015-2020)

b. Serve as the point-of-contact for TEACH lines and coordinate problem resolution with the State BadgerNet Converged Network (BCN). (2015-2020)

c. Monitor new data communications technology and, in consultation with the LDAC, implement desired changes. (2015-2020)

d. Investigate the feasibility of offering a web-based email system for use by member library staff. (2015-2020)
Objective 1.3. Update central site disaster avoidance and preparedness plan, insuring the continuation of essential services in case of an emergency.

Activities

a. Update plan documentation when there is a change in the following areas: personnel, equipment, software application, notification tree, security, etc. (2015-2020)

b. Maintain and/or upgrade data backup software application for all MCFLS servers and workstations. (2015-2020)

c. Maintain and/or upgrade hardware equipment for data protection and recovery: onsite and offsite backup storage servers, uninterrupted power systems (UPS), etc. (2015-2020)

Objective 1.4. Work with member libraries to improve the remote site network structure in order to maximize network functionality.

Activities

a. As specified in the MCFLS Member Agreement, maintain current MCFLS data communications hardware and software (e.g. routers and switches) located at local member library sites. (2015-2020)

b. Implement MCFLS Board fiscal policy concerning locally funded data communications upgrade initiatives. (2015-2020)

c. Provide consultation and technical assistance to any member library who initiates a request to move outside the MCFLS WAN. (2015-2020)

Objective 1.5. As specified in the MCFLS Member Agreement, assist members with necessary technical assistance in order to maintain remote site hardware and software owned by local member libraries.

Activities

a. (At the request of a member library), assist in coordinating purchases of PC and peripheral devices. (2015-2020)
b. (At the request of a member library), provide remote Help Desk services via telephone and email to help troubleshoot basic equipment problems for member libraries. (2015-2020)

c. (At the request of a member library) and on a cost-recovery basis, provide direct onsite hardware and software maintenance and support services for those member libraries that elect MCFLS as their vendor. (2015-2020)

Objective 1.6. On a cost-recovery basis provide a range of expert “special project” automation consultation services to member libraries.

Activities

a. (At the request of a member library) for new building construction, expansion, or large-scale upgrades, provide consultation services relating to Local-Area-Network design and configuration, equipment selection, connectivity to local municipal network resources, and/or movement outside the MCFLS network. (2015-2020)

b. (At the request of a member library), serve as the library’s representative and coordinator in the planning and implementation of services involving third party automation vendors and providers. (2015-2020)

c. (At the request of a member library) broker large-scale local automation equipment purchases. (2015-2020)

d. (At the request of a member library), implement and/or coordinate the installation of large-scale local automation purchases. (2015-2020)

e. (At the request of a member library), implement equipment warranty provisions and provide necessary follow-up during the warranty period. (2015-2020)

GOAL 2

To expand and improve the integrated library system (ILS) functionality to meet the needs of users and staff.

Objective 2.1. Provide support assistance to member libraries regarding all aspects of ILS functionality.

Activities

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a. As point of first-contact, provide Help Desk services via telephone and email. (2015-2020)

b. As needed beyond first-contact, provide staff expertise to analyze software issues and, as appropriate, open trouble calls with Innovative Interfaces. Follow-up as necessary to ensure prompt problem resolution. (2015-2020)

c. With LDAC input, maintain software tables, options selections, and codes. Identify and implement appropriate adaptations and modifications of the application software to fulfill member library requests. (2015-2020)

d. Identify and implement strategies and shortcuts to improve member library knowledge and efficiency. (2015-2020)

1. Investigate options for better collection development reports including the possible use of third party products. (2015-2020)

2. Train member library staff on important ILS functionality using in-person training and GoTo Meeting software at regularly scheduled intervals. (2015-2020)

3. Train member library staff to extract data from Sierra SQL tables for use in reports that were not possible in the previous ILS. (2015-2020)

4. Gradually transition away from the classic catalog and toward the Encore-based catalog as staff and patrons become more comfortable with the interface changes. (2015-2020)

Objective 2.2. Provide administrative leadership and support for software upgrades and enhancements to the integrated library system (ILS), identify possible new purchasable products or subscriptions, and implement purchased products.

Activities

a. Relative to all standard (non-fee-based) ILS upgrades and enhancements (i.e. “new releases”), brief LDAC and other key member library staff in advance of implementing associated functionality changes, facilitate LDAC input and relevant decision-making, implement the software load of the new release during library closed hours, and provide all necessary post-implementation problem troubleshooting and follow-up training. (2015-2020)

b. Identify products offered by Innovative Interfaces and/or third party vendors that might add value to the integrated library system. Research applicability to
member library needs and provide recommendations for purchase to the LDAC and MCFLS Board. (2015-2020)

1. Explore an update to the CountyCat catalog as part of a comprehensive redesign (including the system website) using responsive design principles. These principles would allow library information to be available on mobile devices as well as desktop computers using the same website. Consultation with a third party vendor would also be a part of this process. (2015 - 2020)

2. Investigate the use of Innovative mobile staff apps for paging lists, review files and other applications to streamline workflows. (2015-2020)

3. Leverage the power of Sierra SQL access to provide alternative reporting options for member libraries in the form of canned reports or special reports provided upon request. (2015-2020)

4. Investigate and make recommendations for the Quick-Click ordering product (Innovative Interfaces) for simplifying and accelerating order processing from vendors. (2015)

c. Implement enhancements from Innovative Interfaces. (2015-2020)

1. Purchase a replacement for the Innovative Teleforms machine which is used to contact patrons to alert them of items available for pickup at the library. (2015)


d. Provide all relevant assistance to member libraries for system-purchased Innovative Interfaces products. (2015-2020)

e. Provide all relevant assistance to member libraries that choose to independently purchase Innovative Interfaces products. (2015-2020)

Objective 2.3. Expand knowledge of integrated library system (ILS) and its capabilities. Contribute to the Innovative Interfaces enhancement process and participate in statewide initiatives to improve patron access to materials.

Activities

b. Participate in the Innovative Interfaces enhancement suggestion process in order to ensure that MCFLS concerns receive adequate attention. (2015-2020)


d. Become proactively involved in statewide discussions concerning the direction of the ILS ensuring our members have a voice in the road map pursued by the Department of Public Instruction and other statewide initiatives.

**GOAL 3**

To facilitate and expand resource sharing among all libraries inside and outside of Milwaukee County.

Objective 3.1. Offer access to the collections of all MCFLS member libraries to all Milwaukee County residents.

Activities

a. Maintain an online catalog of holdings of all MCFLS member public libraries within an integrated and seamless online catalog. (2015-2020)

b. Provide a 5-day per week delivery system to member public libraries to facilitate the efficient movement of items to end users. (2015-2020)

Objective 3.2. For Milwaukee County residents, offer access to materials not owned by MCFLS member libraries.

Activities

a. Fund a portion of the costs associated with the Milwaukee Public Library’s Interlibrary Loan Services, facilitating coordinated access to unique materials owned by libraries (public and non-public) outside of MCFLS, within the State of Wisconsin and beyond, if necessary. (2015-2020)

b. Fund an appropriate share of costs associated with the statewide delivery
network in order to facilitate delivery of requested materials for Milwaukee County public library patrons from libraries inside Milwaukee County (non-public) and other libraries throughout the State of Wisconsin (public and non-public). (2015-2020)

c. Encourage and provide necessary information to MCFLS member libraries regarding the new electronic INFOPASS program, e-INFOPASS. E-INFOPASS allows patrons access to the holdings of other participating e-INFOPASS libraries throughout the Milwaukee metropolitan area. E-INFOPASS is a paperless alternative to the traditional INFOPASS program. (2015-2020)

Objective 3.3. For patrons/institutions not residing in Milwaukee County and based on DPI Resources for Libraries and Lifelong Learning (RL&LL) Guidelines, facilitate appropriate interloan access to the unique holdings of MCFLS member libraries.

Activities

a. Per MCFLS member agreement, participate in the lending of materials to patrons/institutions not residing in Milwaukee County via Interlibrary Loan. (2015-2020)

b. Fund an appropriate share of costs associated with the statewide delivery network in order to facilitate access to MCFLS member holdings by users outside of Milwaukee County. (2015-2020)

c. Participate, in meetings, conferences, and initiatives related to interloan issues. (2015-2020)

**GOAL 4**

**To enhance the MCFLS website as well as host member library websites.**

Objective 4.1. Enhance and maintain a website for MCFLS.

Activities

a. Explore an update to the MCFLS website as part of a comprehensive redesign (including the library catalog) using responsive design principles. These principles would allow library information to be available on mobile devices as well as desktop computers using the same website. Consultation with a third party vendor would also be a part of this process. (2015-2018)
b. Annually review the content of the MCFLS website [www.mcfls.org](http://www.mcfls.org) implementing necessary improvements to the site in order to enhance the delivery of up-to-date information to MCFLS, member libraries, and the wider public. (2015-2020)

c. Regularly maintain and update the MCFLS knowledge base, a source for Administrative and CountyCat procedural information. (2015-2020)

Objective 4.2. Host and assist member library websites.

Activities

a. (At the request of a member library), host member library websites. (2015-2020)

b. Provide reasonable assistance to those member libraries whose websites are hosted on a MCFLS server, e.g. uploading files, troubleshooting problems. (2015-2020)

c. Facilitate integration of member library websites hosted by MCFLS with the Expression Web client (successor to FrontPage). (2015-2020)

**GOAL 5**

**To facilitate MCFLS and member library participation in the Wisconsin Public Library Consortium’s digital download media buying pool.**

Objective 5.1. Keep current with all emerging technologies related to technology and digital downloads.

Activities

a. Participate in statewide information sharing related to digital downloads, including attending Wisconsin Public Library Consortium (WPLC) Board meetings. Share new developments with the MCFLS Board and LDAC. (2015-2020)

b. Utilize blogs, trade publications, and other resources to stay current with technology related to digital downloads. (2015-2020)
c. Facilitate system participation in the Digital Library Steering Committee and other WPLC subcommittees to ensure MCFLS member libraries have a voice in any future direction taken by the WPLC. (2015-2020)

Objective 5.2. Train MCFLS member library staff in serving patrons who use digital download services.

Activities

a. Offer training to MCFLS member library staff on how to use digital download services. Provide handouts and/or training materials. (2015-2020)

b. Provide online resources dedicated to helping patrons troubleshoot and/or learn more about digital download services. (2015-2020)

Objective 5.3. Insure adequate funding for the digital download media buying pool.

Activities

a. Coordinate with MCFLS member libraries to insure adequate funding is maintained. (2015-2020)

GOAL 6

To help purchase and/or broker purchases of online content delivery products.
Objective 6.1. Purchase and/or broker purchases of online content delivery products for MCFLS libraries.

Activities

a. Within the constraints of the MCFLS budget for online content delivery products, purchase and/or broker purchases of appropriate online content delivery products for member libraries. (2015-2020)

b. Seek input and recommendations from the LDAC regarding product purchases. (2015-2020)

c. Integrate products within the library catalog as appropriate. (2015-2020)

GOAL 7

To assist member library staff in becoming more technologically knowledgeable and proficient.

Objective 7.1. Provide technology-related consultation and education to member library staff at all levels.

Activities

a. Per request of the LDAC, provide MCFLS staff technology workshops to member library staff. (2015-2020)

b. Provide MCFLS continuing education offerings on topics related to technology. (2015-2020)

c. Identify non-MCFLS, technology-related educational opportunities for member libraries, e.g. UW-Milwaukee SOIS, other Wisconsin Library Systems, other websites. (2015-2020)

GOAL 8

To maintain and enhance MCFLS technology staff professional competencies.
Objective 8.1. Identify appropriate training and membership opportunities for MCFLS technology staff.

Activities

a. Allocate funds for MCFLS staff conference/training needs as a separate line item within the annual MCFLS budget. (2015-2020)

b. Encourage and fund MCFLS staff memberships in professional organizations as a vehicle for peer exchange and networking. (2015-2020)

GOAL 9

To organize and maintain all appropriate automation product licensing and technical documentation.

Objective 9.1. Maintain all central site licenses and maintenance agreements and provide member libraries with all appropriate documentation for MCFLS controlled network equipment.

Activities

a. Ensure that all appropriate central and remote site automation product licenses and maintenance agreements are current and up-to-date and maintain copies in a secure fireproof location. (2015-2020)

b. As specified in MCFLS Member Agreement, provide members annually an updated inventory list of MCFLS controlled network equipment, located at the participating library locations. (2015-2020)

GOAL 10

To insure adequate funding for the Technology Plan.

Objective 10.1. Budget for this plan within annual operating budget as well as capital outlays for future needs.

Activities
a. Fund all ongoing components of this plan with appropriate budgetary line items. (2015-2020)

b. As appropriate, build up reserve funds over multiple years for anticipated capital replacement and/or upgrade expenditures. (2015-2020)

**Evaluation**

This plan covers a five year period. No later than March of the fifth year (2020), an inclusive participatory process will be utilized to undertake a thorough review and revision of the Plan. Based upon appropriate input by all relevant parties, a detailed revision of the document will be implemented.

Annually, technology staff will review the plan to insure that additional activities are included within the plan.