MISSION
MCFLS (Milwaukee County Federated Library System) 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.

INTRODUCTION
Milwaukee County Federated Library System’s current strategic plan was approved by the MCFLS Board on May 20, 2019. The plan identified strategic directions, service goals, initiatives, and activities for 2020 through 2024. Despite major interruptions to service and operations during the COVID-19 pandemic, MCFLS staff successfully worked through much of the plan. Anticipating the conclusion of the previous strategic plan, MCFLS released a request for proposals for strategic planning services in June 2023. Rachel Arndt Consulting, LLC was selected to facilitate the strategic planning work and a contract was agreed upon in August 2023. This work will culminate in a new four-year strategic plan covering 2025 – 2028.

Background research included a review of the MCFLS’s previous strategic plan\(^1\), the Milwaukee County strategic focus areas\(^2\), and Milwaukee County census data\(^3\). This work helped inform the initial kick-off meeting and draft of survey questions.

METHODOLOGY
A kick-off meeting was held on September 7, 2023, including MCFLS’s Legislative & System Services Committee members, Director, Steve Heser, and Consultant Rachel Arndt. This meeting finalized the timeline and elements included in the strategic planning process. The first step in gathering relevant data to evaluate the system’s strengths and weaknesses was an online survey to collect feedback about MCFLS patron satisfaction. This survey was available from October to November 2023 and had over 10,000 responses representing patrons from all MCFLS member library locations.

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3 U.S. Census Bureau. Milwaukee County, Wisconsin. [https://data.census.gov/profile/Milwaukee_County_Wisconsin?g=050XX00US55079](https://data.census.gov/profile/Milwaukee_County_Wisconsin?g=050XX00US55079)
METHODOLOGY (cont.)

A second online survey in November 2023 collected feedback from MCFLS member library directors about member satisfaction. Both surveys served as a SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis baseline for further exploration at the MCFLS Member Retreat held on January 18, 2024, at UWM (University of Wisconsin Milwaukee) School of Continuing Education. There were 22 participants representing MCFLS member libraries, MCFLS board members, and MCFLS staff at the full-day retreat. Retreat participants collaboratively through facilitated discussions and completed visioning exercises designed to elicit significant feedback about MCFLS and its future.

Survey feedback from patrons and members was also presented during a half-day retreat for MCFLS staff members on February 7, 2024, at the MCFLS office. All seven staff members were present and participated in facilitated discussions which culminated in visioning exercises to hone the emerging ideas from the member retreat.

Consultant Rachel Arndt met with MCFLS’s Legislative & System Services Committee after both retreats to debrief and analyze findings as well as review the emerging themes, ideas, and goals.

MCFLS retains all the data collected in JotForm from the two surveys, images of the small group notes, and received written debrief reports following both retreats.

FINDINGS

A review of MCFLS’s 2020 – 2024 strategic plan demonstrates that the system director and staff addressed nearly all the goals and objectives within the duration of the strategic plan timeframe. Feedback in the member library and staff retreats indicated that this strategic plan was effective and successful. This success is notable since many library functions and operations were disrupted in 2020 due to the Coronavirus pandemic mandated closures and service adjustments. While this disruption was significant for both MCFLS and member libraries, feedback noted the leadership, adaptability, and support from MCFLS was valued by members during this uncertain time and until operations could resume regularized practices.

Throughout the 2020-2024 plan, prioritization and project phasing ensured that the MCFLS staff capacities were not overburdened. MCFLS staff indicated that this type of project management was key to the strategic plan’s success.

A patron satisfaction survey was promoted through online marketing efforts and boosted social media advertising. Some member libraries also shared the survey with patrons through their library communication methods. This may have had the effect of skewing the survey towards regular library users, those who are more comfortable with technology and those who already receive library marketing material. This methodology may exclude those patrons with less access or comfort with technology, those in the library service area that do not already receive library marketing material, or library non-users. There were just over 10,000 responses to the survey with the largest sample of responses identified as over the age of 60 (4,888 responses; 49%). This survey may be helpful in identifying the satisfaction and needs of older adult patrons given this large response.
FINDINGS (cont.)

Within the patron survey, respondents were asked to identify the library they use most frequently. Data showed that all MCFLS member library locations were represented in survey responses. The patron survey was structured to gather satisfaction data about patron experiences with core MCFLS services: obtaining library materials through the holds and delivery system, the CountyCat mobile app, digital materials, and online learning available to patrons, and the types of activities patrons engage in at Milwaukee County libraries. Some survey results were utilized as content and context during both the member and staff retreats. MCFLS retains the raw survey result. Overall, MCFLS patrons were satisfied with these core services and patrons deeply appreciate and value their libraries for a wide variety of reasons. The results showed that some patrons lack awareness about library programs, services, and available online resources and may desire more training around library technology and online resources.

The member library survey served as a baseline for collaborative SWOT analysis to assess MCFLS’s strengths, weaknesses, opportunities, and threats during the member retreat. Significant participation from MCFLS board members and library members affirmed that MCFLS has a positive reputation for success and member engagement. Member feedback also indicated that MCFLS is effectively utilizing its budget, staff, and resources to benefit member libraries and their patrons. Participants agreed that the system leadership and staff contribute significantly to the success of system goals. Participants felt system staff knowledge and expertise led to a collaborative and supportive environment for member libraries.

A mini-retreat for MCFLS staff brought together findings from the patron and member surveys for a staff-focused SWOT analysis. MCFLS staff comments reinforced the successes of the previous strategic plan and its implementation method of prioritizing and phasing new initiatives so that major projects were staggered. This methodology will be carried over into the next MCFLS strategic plan.

[Full strategic plan continued next page]
AREAS OF FOCUS
in alphabetical order

I.  Advocacy
MCFLS will advocate for system and member library support, goals, and resources.

II. Data Collection & Utilization
MCFLS will review existing data collection points provided to members and employ new methods of data analytics to enhance understanding of library outputs and outcomes.

III. Organizational Culture
MCFLS will review its internal operations updating them to account for the addition of personnel, remote work conditions and a desire to foster an inclusive culture where all system staff are empowered to learn new skills and communicate well on behalf of the organization.

IV. Patron Experience
MCFLS will lead members in reviewing internal decision making to ensure the patron experience is a positive one with high-quality, reliable services to all system library patrons.

V. Stewardship
MCFLS will investigate new tools and methodologies in alignment with member goals that leverage system resources and improve organizational activities.

VI. Strengthen Member Libraries
MCFLS will explore professional development opportunities for the library system. It will develop a consistent, structured method of communication with MCFLS stakeholders and members to improve engagement and information sharing.
I. **Advocacy**

MCFLS will advocate for system and member library goals, financial support, and library resources. MCFLS makes connections that benefit the library system and its members. MCFLS will build and maintain relationships within Southeastern Wisconsin to grow capacity and support for MCFLS and member libraries.

**GOAL:** Work with member libraries to build relationships with municipalities and key community partners.

- Action: Educate elected leaders at local, system, and state levels.
- Action: Increase library visibility at the Milwaukee County Intergovernmental Cooperation Council (ICC).
- Action: Define successful structures, pathways for relationships with community partners.
- Action: Share methods, tool kit, ideas, and templates for cooperation.

**GOAL:** Delivers legislative awareness for member libraries.

- Action: Coordinate system engagement in Library Legislative Day.
- Action: Establish system priorities to be shared with legislators.
- Action: Perform environmental scans for legislative actions and governance or political issues that may impact member libraries and communicate accordingly.

**GOAL:** Work collaboratively with member libraries to provide visibility and marketing for library resources in Milwaukee County and reinforce the value of libraries in the community.

- Action: Continue to hone MCFLS branding.
- Action: Provide documentation on library resources for members to use with patrons.
- Action: Work with member libraries to identify underserved library audiences, including lapsed and prospective users, and tailor appropriate outreach initiatives while prioritizing the confidentiality of patron personal information and data.
- Action: Engage the public via member libraries to solicit action where appropriate, i.e., go to the library, get a card, etc.

**GOAL:** Support First Amendment rights, patron privacy, and freedom to read.

- Action: Work with the MCFLS Board and member libraries to develop uniform, consistent messaging on core concepts and values that underpin library services to all patrons.

**GOAL:** Pursue available opportunities for financial support for members to expand their library resources.

- Action: Identify and facilitate member library use of local, state, and federal sources of grant funding.
II. Data Collection & Utilization

MCFLS will utilize data analysis for enhanced understanding of library outputs and outcomes. MCFLS and member libraries collect and access relevant data about their libraries, collections, and patron activities. Data provides MCFLS members and staff with the information necessary to draw conclusions, make decisions, or further explain outcomes.

GOAL: Engage data analytics to further evaluate MCFLS data for decision-making, contextual understanding, and understanding of patron and library outcomes.

- Action: Review current data collection points provided to member libraries by MCFLS staff. Work with the MCFLS Board and member libraries to collect and examine new data points as needed.
- Action: Contextualize existing data to provide a broader perspective on how system resources can be better utilized.
- Action: Continue working through the DPI (Department of Public Instruction) and state to expand the data visualization project and provide useful metrics through dashboards and other means. Use this project as a starting point for evaluation of and replacement for the current MCFLS dashboard.

GOAL: Evaluate patron satisfaction on an ongoing basis.

- Action: Utilize existing patron satisfaction data as baseline.
- Action: Track patron satisfaction data over time for changes and to evaluate progress.

GOAL: Examine staffing models for a professional data analyst.

- Action: Work with the MCFLS Board and member libraries to define MCFLS data analytic needs.
- Action: Determine the financial feasibility of collaborating with other systems on procuring the services of a data analyst or using system funds for hiring an analyst as a system employee.
III. **Organizational Culture**

MCFLS will review its internal operations updating them to account for more personnel, remote work conditions and a desire to foster an inclusive culture where all staff are empowered to learn new skills and communicate well on behalf of the organization.

**GOAL**: Perform a systematic review and update of MCFLS policy and procedures to reflect current practices.
- Action: Review internal procedures tied to office operations updating them to reflect current personnel and work environment.
- Action: Identify time-sensitive system policies and procedures and implement a process for (at minimum) an annual review of those documents, soliciting feedback from the MCFLS Board and LDAC as needed.
- Action: Implement a review of position responsibilities regularly to ensure business continuity and aid in succession planning when staff turnover occurs.

**GOAL**: Develop strategic internal communication structure.
- Action: Set up a platform for system staff to collect input from library staff and list unresolved help desk items.
- Action: Define a protocol for all system staff that outlines appropriate responses to library staff to help organization communication become consistent and clear.
- Action: Develop a MCFLS communication plan identifying stakeholders and channels of communication and norms to be used by all staff.
- Action: With input from MCFLS Board and member libraries, create a crisis communications plan for the system defining responsibilities and procedures in the event of a time-sensitive emergency.

**GOAL**: Establish organizational values to support MCFLS mission and vision and cultivate a shared staff culture.
*Findings from strategic planning may serve as a starting point for identifying values.*
- Action: Facilitate values-based conversations to hone ideas and reach consensus on organizational values.
  - o Involve MCFLS Board and member libraries in discussions, decision-making for organizational values.
  - o Determine how those organizational values will impact current and new system activities.
- Action: Publish organizational values and incorporate them into the MCFLS office and culture.
  - o Help system staff understand their role in contributing to the mission and value of the organization.
  - o Create a process where system staff are able to contribute ideas in a meaningful way about future organizational activities which are then reviewed and discussed among the full team on an annual basis.

**GOAL**: MCFLS staff development and continuing education supports growth of staff expertise and tailored to MCFLS staff roles.
- Action: Commit the financial resources necessary to ensure system staff are well-educated and informed to perform their responsibilities at a high level.
- Action: Include continuing education participation within the annual performance review of each system staff member.
- Action: Arrange one professional development event for system staff that addresses ways to foster a supportive and inclusive work culture.
IV. **Patron Experience**

MCFLS will support high quality service to all system library patrons. MCFLS will lead members in reviewing internal decision making to ensure the patron experience is a positive one with high-quality, reliable services to all system library patrons. MCFLS will support member libraries delivering responsive, innovative services to existing library users and new communities of users in the County.

**GOAL: Apply equity lens to system decision-making.**
- Action: Create a board policy to always include an evaluation of how DEI (Diversity, Equity, and Inclusion) concerns are being addressed when introducing new or evaluating current system services.
- Action: Prioritize the expansion of diverse perspectives when hiring system staff and recommending appointments to the MCFLS Board.
- Action: Begin the process of integrating the Milwaukee County Racial Equity Budget Tool (REBT) into the system budgeting process.

**GOAL: Automate processes and patron self-services to reduce staffing pressures.**
- Action: Leverage improvements in library automation technology to improve service and connection to communities. For example, utilizing improvements to self-checkout and self-registration to provide efficiencies for both libraries and patrons.
- Action: Evaluate off-hours access to materials, such as holds-lockers.

**GOAL: Identify and seek opportunities to reduce barriers and differences across member libraries that may impact patrons.**
- Action: Survey member libraries on areas of collaboration including a system-wide fee card, consistent circulation periods and/or fine amounts.

**GOAL: Identify audiences and areas of service improvement for greater inclusivity.** [examples of audiences: aging populations, adults with low literacy, homebound, low-income, individuals with disabilities]
- Action: Work with member libraries to identify and build vital relationships with community partners to meet patron needs.
- Action: Identify strategies to connect with lapsed, in-active, or non-users.
- Action: Utilize accessibility features or other technologic solutions for patrons with disabilities to access online resources.
V. **Stewardship**

MCFLS will effectively steward system resources. MCFLS provides collaborative and fiscally responsible service to member libraries, meeting or exceeding all its statutory obligations as defined in WI Stat § 43.17, 43.19, 43.24. Members expect quality core services such as materials delivery, management of the ILS (Integrated Library System), and technology maintenance. MCFLS will evaluate member satisfaction and seek opportunities for improvements to these services as they become available, minimizing disruptions to MCFLS members.

**GOAL: Develop electronic document management for MCFLS policies and MCFLS board materials.**

- Action: Investigate the use of an online document management tool to allow for easy access to committee agendas, minutes, and important files for the MCFLS Board and all committees.

**GOAL: Leverage system resource and project management to benefit all member libraries and their patrons.**

- Action: Identify system priorities that benefit all members.
- Action: Reduce system infrastructure costs for members wherever possible.
- Action: Evaluate reciprocal borrowing ahead of system agreements.
- Action: Perform an ongoing evaluation of system-provided electronic resources for value and effectiveness to residents of Milwaukee County.
  - Action: Manage MCFLS capacity.
    - Leverage project management tools.
    - Use phased implementation.
- Action: Utilize successful system models, including MCFLS’s own templates for success.

**GOAL: Proactively monitor library and affiliated vendor and service landscapes for new system resource opportunities.**

- Action: Identify sources of new resource opportunities at the local, state, and national level.
- Action: Work with member libraries to vet these opportunities and ensure successful adoption (for example: TBS printing and time management, Patron Point, etc.).
VI. **Strengthen Member Libraries**

**MCFLS will strengthen member libraries with professional resources and expertise.** MCFLS will develop a consistent, structured method of communication with MCFLS stakeholders and members to improve engagement and information sharing.

**GOAL:** Create structured opportunities for networking and knowledge sharing among member libraries.
- Action: Develop engagement strategies for Library Directors’ Advisory Council (LDAC).
- Action: Scale system, LDAC, and subcommittee collaboration and information sharing.

**GOAL:** Provide continuing education that responds to industry trends, library priorities, and the necessary knowledge to best meet member library needs.
- Action: Ensure that continuing education is relevant and tailored to member library staff through ongoing participation in the Southeast Wisconsin (SEWI) continuing education cohort.
- Action: Implement technology training and information sharing with member libraries that reflects the dynamic changes occurring in cybersecurity and artificial intelligence.
- Action: Customer service training to member library staff that reflects up-to-date information about local continuum of care, trauma-informed care, and crisis management.
- Action: Provide member libraries with leadership and guidance on matters related to inclusivity and outreach to communities through continued collaboration with community partners.

**GOAL:** Effectively communicate with MCFLS stakeholders and members.
- Action: Assess volume and method of e-mail communication for large, technical projects.
- Action: Diversify communication methods used by system using the MCFLS communications plan.
- Action: Identify areas for uniformity in system and member library policies.
- Action: Provide regular structured, scheduled communication to members and MCFLS Board.

**GOAL:** Explicitly define the MCFLS role in serving patrons directly.
- Action: Work with MCFLS system staff, MCFLS Board and member libraries to determine how and what support to patrons is required by MCFLS to be most effective.
- Action: Determine what financial resources must be put in place to meet these patron support needs.
- Action: Provide access to specific training resources to assist member libraries to meet patron needs.