



Required by Wis. Stat. §§ 43.17(5) and 43.24(3)

GENERAL INFORMATION

Library System

Milwaukee County Federated Library System

Describe significant needs and problems that influenced the development of this and other system plans.

In late 2018 and the spring of 2019, MCFLS engaged with member libraries on a new strategic planning initiative that identified several needs to be addressed by the system. The result was an ambitious set of directives in the 2020-2024 MCFLS Strategic Plan. Among these were improvements in technology and improving the user experience, particularly the experience for users on mobile devices. Another high priority identified by members was a need for investment in marketing system and local library resources in addition to advocacy for their libraries and communities.

MCFLS is challenged to meet these needs and as a result will restructure contracts and agreements to allocate enough funding to meet those directives. Rising costs for the hoopla streaming service, another strategic plan initiative, have forced the system to already reduce the number of max checkouts to ensure the service remains viable. Although the service has been popular, the rising costs will force the system and members to continually re-evaluate this investment. State and county aid levels will remain flat for 2020, making the completion of these directives an even more difficult proposition for the system and members.

Because of the system's small geographic area and dense population, MCFLS member libraries need to work together closely to meet the needs of residents that often don't notice or understand the differences between each library. This has affected the development of this plan and other plans. The 2020-2024 MCFLS Strategic Plan in particular includes language specifically aimed at providing more system level resources and seeking consistent circulation policies across libraries to reduce confusion among patrons.

Many of the member library communities are struggling with revenue for their library even in a period of economic growth. The restructured contracts and agreements make it possible for MCFLS to provide new or enhanced services, but this shifts some of the burden to members. Many member libraries rely heavily on MCFLS reciprocal borrowing and resource library payments; these payments provide important services for member libraries directly. The larger impact is that while these contracts provide some relief to member libraries, system services may suffer in comparison to others within the state.

Did the library system consult member libraries in the development of this plan?

- No, the library system did not include member libraries in the development of this plan.
- Yes, the library system included member libraries in the development of this plan.

If yes, describe the planning environment and process for this system plan. Include how member libraries are involved in plan development and review:

Member libraries were shown the plan in advance of the September 5th Library Directors Advisory Council (LDAC) meeting and invited to make comment and suggest changes either at the meeting itself or via email. The plan will be presented to the MCFLS Board for approval in September 2019.

Does the library system have a formally appointed advisory committee under Wis. Stat. § 43.17(2m)?

- No, the library system does not have a formally appointed advisory committee.
- Yes, the library system has a formally appointed advisory committee.

If the system appoints an advisory committee under Wis. Stat. § 43.17(2m), describe how the system makes appointments, posts meetings, and how the advisory committee reports to the library system board. Include a list of any additional system planning documents with the period covered and attach any planning documents which have not previously been provided to the Division:

The system has a designated advisory committee called the Library Directors Advisory Council, or LDAC. This committee reports directly to the MCFLS Board and has been in place for many years. Each MCFLS member library is granted one appointed member on the LDAC with voting rights; Milwaukee Public, by virtue of its role as resource library, is granted an additional position on the LDAC committee.

Members of the LDAC meet regularly each month to discuss matters of importance to the system and advise the MCFLS Board and system staff on any topics that come before it. While most informational subjects are sent to the LDAC group via an email

GENERAL INFORMATION (cont'd.)

distribution list maintained by the system, matters that require discussion or action are added to the regular agenda each month. The meetings are posted to a regular distribution list that includes the LDAC members as well as the MCFLS Board of Trustees. The agenda packets (which include minutes) are added to the system website as soon as they are sent via email. Additionally, the chair of LDAC attends regular MCFLS Board meetings, submits a written report and verbally delivers that report to the Trustees.

The 2020-2024 MCFLS Strategic Plan will be available at <https://mcfls.libguides.com/admin/system-agreements-planning>. The plan includes four major strategic directions:

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.

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.

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.

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.

Work has already begun on the strategic plan, including the implementation of a new mobile app and creation of a marketing and advocacy committee, two high priorities identified by members during surveys and an all-day development meeting held in February 2019.

Other planning documents include the Interlibrary Services Contract with the Milwaukee Public Library, the 2020-2024 Cataloging Contract, the MCFLS Membership Agreement, the 2020-2024 ILS, Resource Sharing, and Technology Agreement, and the 2020-2024 Resource Library Agreement. The Cataloging, Resource and ILS agreements will be approved this Fall and available at <https://mcfls.libguides.com/admin/system-agreements-planning> before the January 15th deadline.

ASSURANCES

The following plan and compliance document provides assurance that your public library system intends to comply with all statutory requirements for public library systems for calendar year **2020**. Indicate, with a check, your system's intent to comply with each system requirement and provide the requested information under each system requirement.

Wis. Stat. § 43.24(2) For a public library system to qualify for and maintain its eligibility for state aid under this section it shall ensure that all of the following are provided:

Membership Agreements

- Wis. Stat. § 43.24(2)(a) Written agreements that comply with Wis. Stat. § 43.15(4)(c)4 with all member libraries.
- The system will provide a sample copy of the agreement with a list of all members signing and the dates signed to the Division by January 15. (The system does not need to file multiple copies of the same agreement; only a sample copy of each type of agreement is necessary.)

If the system is providing the sample copy and list of members signing through a publicly available webpage, provide the URL here:

<https://mcfls.libguides.com/admin/system-agreements-planning>

Resource Library Agreement

- Wis. Stat. § 43.24(2)(b) Backup reference, information and interlibrary loan services from the system resource library, including the development of and access to specialized collections, as evidenced by a written agreement with that library.
- The system will provide a signed copy of the resource library agreement to the Division by January 15.

If the system is providing the resource library agreement through a publicly available webpage, provide the URL here:

<https://mcfls.libguides.com/admin/system-agreements-planning>

	ASSURANCES (cont'd)	
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Reference Referral, Interlibrary Loan, and Technology

- Wis. Stat. § 43.24(2)(d) Referral or routing of reference and interlibrary loan requests from libraries within the system to libraries within and outside the system.

List ongoing activities related to this requirement:

MCFLS contracts with the Milwaukee Public Library to provide this service to all member libraries. The Milwaukee Public Library also contracts with the Reference and Loan Library to meet an agreed upon number of requests from Wisconsin residents for interlibrary loan materials. Interlibrary loan requests within the system are handled through the shared ILS and system-provided delivery.

MCFLS contracts with the Milwaukee Public Library to provide back-up reference as the system resource library. As part of the 2020-2024 Resource Library contract, MPL also provides training, consulting, and other assistance to other member libraries and their staff. An annual report of resource library activities is shared with the MCFLS Board each February.

MCFLS provides:

- *remote authentication services for reference databases that member libraries offer to the public;
 - *online forms for public requests for new materials;
 - *system-wide email through Outlook 365 and website hosting;
 - *coordination of the use of third-party products working with the ILS, including computer management software, RFID software, and enhanced content for the online catalog;
 - *regular lists of popular materials in the library catalog;
 - *and coordination of group purchasing of electronic databases.
- *A major service program MCFLS supports is reciprocal borrowing across municipal borders. This ongoing activity supports net lender member libraries through the distribution of 38% of state aid and supports those libraries in their ability to offer quality service and collections for all users. This is an ongoing activity for 2020.
- *MCFLS contracts with the Milwaukee Public Library to provide centralized cataloging for all materials in the system.
- *In 2019, MCFLS significantly upgraded on-site hardware and replaced three servers related to delivery of the ILS software (two Sierra servers and one Encore server). In addition, the system added a Unitrends backup appliance that will backup all onsite hardware and system staff machines. We hope this Unitrends appliance can be used within the context of the state backup solution that is currently being implemented.
- Indicate new or priority activities relating to this requirement for the plan year (if none, indicate so):**
- *As part of the new strategic plan, contract with a new vendor to provide a new and improved mobile app for Milwaukee County residents.
 - *As part of the new strategic plan, provide a new annual report on technology activities provided by the system, including current equipment hardware lists and recommended settings.
 - *System staff will create a variety of easily accessible and usable training opportunities and resources for member library staff. Libraries will be surveyed to determine their training needs.
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ASSURANCES (cont'd)

Inservice Training

- Wis. Stat. § 43.24(2)(e) Inservice training for participating public library personnel and trustees.

The Division interprets inservice training to incorporate a range of in-person and virtual continuing education opportunities.

List ongoing activities related to this requirement.

MCFLS continues to participate as a member of the SEWI continuing education consortium, managed through the Bridges Library system. Through this partnership, MCFLS offers member libraries regular continuing education opportunities. The MCFLS Library Systems Administrator works with the MCFLS Director to coordinate continuing education planning, with MCFLS staff reviewing CE hours related to member library director certification. MCFLS also provides regular in-person, hands on training sessions through staff and vendor representatives on MCFLS-specific products and services. Regular training on ILS functionality is provided, as is training on digital streaming services and traditional databases. Additionally, MCFLS participates financially in statewide online training events, such as the Trustee Training Week, Tech Days and Wild Wisconsin Winter Webinar series. MCFLS and member library staff have also participated as speakers in these series.

Indicate new or priority activities relating to this requirement for the plan year (if none, indicate so):

MCFLS staff will be again offering a set of training sessions designed to improve staff knowledge of the Sierra ILS and electronic resources offered throughout the system. After surveying member libraries to determine training needs, MCFLS staff will also create new training content as part of the strategic plan. Staff plan to 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. This is also a new activity derived from the strategic plan.

Identify the names and email addresses of continuing education staff employed by the system for continuing education services:

If the system contracts with another system or entity to plan and conduct continuing education services, list that system or entity and provide a link to, or copy of, the current agreement:

Bridges Library System

<https://mcfls.libguides.com/admin/system-agreements-planning>

Delivery and Communication

- Wis. Stat. § 43.24 (2)(fm) Electronic delivery of information and physical delivery of library materials to participating libraries.

List ongoing activities related to this requirement. For physical delivery reference resources, personnel, and vendors.

MCFLS administers system-wide daily (M-F) physical delivery to every library in the system through a contract with Action Logistics. MCFLS fully funds this service for member libraries. MCFLS also funds regular delivery to other systems through the South Central Library Delivery service. In 2017 MCFLS improved its ability to provide electronic delivery of information through an email upgrade to Office 365 for all member libraries. MCFLS manages the wide area network connecting member libraries to the catalog and out to the internet. MCFLS also manages and funds the library's internet connection through WiscNet. The system intranet page has been converted to a simpler, more easy to use format using LibGuides CMS. The MCFLS network administrator has completed a clean up of various email distribution lists maintained by the system and made it easier for member library directors to update these lists.

Indicate new or priority activities relating to this requirement for the plan year (if none, indicate so):

*Pending approval MCFLS plans to upgrade both WAN and Internet lines from 500 Mbps to 1 Gbps. This will allow us to support additional growth as more bandwidth is required at member libraries.

*The MCFLS system website will be fully transitioned to Wordpress in 2020. Plans to upgrade the CountyCat splash screen are also in the works and we hope will be completed in 2020.

ASSURANCES (cont'd)

Service Agreements

- Wis. Stat. § 43.24(2)(g) Service agreements with all adjacent library systems.
- The system will provide a copy of the agreements to the Division by January 15. The agreements with adjacent systems – including consulting agreements, consortium agreements, etc. – must include a list of all systems signing the agreement.

If the system is providing the service agreements through a publicly available webpage, provide the URL here:

<https://mcfls.libguides.com/admin/system-agreements-planning>

If the system is providing the service agreements through a publicly available webpage, provide a brief description of the types and number of agreements here:

Other Types of Libraries

- Wis. Stat. § 43.24(2)(L) Cooperation and continuous planning with other types of libraries in the system area, which results in agreements with those libraries for the appropriate sharing of library resources to benefit the clientele of all libraries in the system area.
- The system will have agreements with other types of libraries, or if the system participates in a cooperation agreement with a multitype organization to meet the purposes of this goal, there is established a clear link between the system and the individual members of the multitype organization. The system will provide a copy of the agreement with a list of all signing libraries to the Division by January 15.

If the system is providing the agreements with other types of libraries through a publicly available webpage, provide the URL here:

If the system is providing the agreements with other types of libraries through a publicly available webpage, provide a brief description of the types and number of agreements here:

Library Technology and Resource Sharing Plan

- Wis. Stat. § 43.24(2)(m) Planning with the division and with participating public libraries and other types of libraries in the area in regard to library technology and the sharing of resources. By January 1, 2000, and every fifth January 1 thereafter, the public library system shall submit to the division a written plan for library technology and the sharing of resources.
- The system will provide the current plan for library technology and resource sharing to the Division by January 1, 2020. See [the Library System Technology and Resource Sharing plan webpage](#) for more information.

If the system is providing the current technology and resource sharing plan through a publicly available webpage, provide the URL here:

<https://mcfls.libguides.com/admin/system-agreements-planning>

Is the plan current and comprehensive for the technology and resource sharing services the system provides?

- Yes, the library system technology and resource sharing plan is current and comprehensive for the technology and resource sharing services the system provides.
- No, the library system technology and resource sharing plan is not current or comprehensive for the technology and resource sharing services the system provides or will provide.

If no, describe what the system has added, changed, or eliminated from the plan in effect (and describe how the changes were reviewed with member libraries and approved by the system board):

Indicate new or priority activities relating to this requirement for the plan year:

*Training: MCFLS staff will develop new technology training opportunities, tools and resources that will accommodate a variety of needs and provide common system-wide learning experiences.

*New Mobile App: System staff have surveyed member libraries and arranged demos to select a new mobile app to act as the conduit for mobile users of the catalog and libraries. The app will be implemented in late 2019, but training and improvements will be ongoing in 2020.

*Technology Infrastructure: In 2020, system staff will start the process of assisting to establish standards related to technology equipment and settings by providing an annual report detailing system activities in the past 12 months and providing recommended hardware lists, and browser PC and printer settings. In the future, system staff will provide more assistance to libraries with regard to technology lifecycle planning.

ASSURANCES (cont'd)

Professional Consultation

- Wis. Stat. § 43.24(2)(h) Professional consultant services to participating public libraries.

Identify consultants, specific service areas, and related activities. If the consultant is employed by a member library, indicate the library and the consultant's title:

Submitted by Steve Hesper per DPI request on 11/6/2019: MCFLS staff provide direct consulting to member libraries. The MCFLS director consults libraries on staffing, legal issues, continuing education, library boards, and the annual report. The MCFLS network manager consults with member libraries on all technology-related questions, including full inventories of member library equipment. He also assists libraries with upgrades and direct management of library equipment. The MCFLS ILS administrator consults libraries on ILS questions, databases and authentication, and streaming services.

Indicate new or priority activities relating to this requirement for the plan year (if no change from current year, indicate *None*):

Submitted by Steve Hesper per DPI request on 11/6/2019: Per the 2020-2024 Strategic Plan, the MCFLS network manager in 2020 will provide additional consultation for technology life cycle planning and lists of system-recommended hardware, software and peripherals.

Inclusive Services

- Wis. Stat. § 43.24(2)(k) Promotion and facilitation of library service to users with special needs.

The Division interprets services to users with special needs as inclusive services. Inclusive library services are holistic, spanning library policies, collections, space, and services. Inclusive services reflect equity and accessibility for all members of the community, including services to individuals or groups for whom using the public library is difficult, limited, or minimized.

Indicate new or priority activities relating to this requirement for the plan year:

The Milwaukee Bucks reading program is managed through the MCFLS office. The system supports multiple member libraries with Memory Café programs including financial support for the South Shore Libraries Memory Café. MCFLS has participated in the LibraryNow project (Milwaukee Public Library) since its inception. This project puts access to library resources into the hands of all Milwaukee Public School students, including many underserved or marginalized young people. Standing library committees, including the Adult & Reference Services committee, the Youth Services committee, and the Young Adult services committee, frequently include inclusive services as a topic in their regular meetings. For example, the Adult & Reference Services committee will have special presentations on serving an aging population and a special tech show-and-tell that features assistive technologies. The system is also working with a Milwaukee Public Library staff member on providing more awareness of Government Alliance on Race and Equity (GARE) background and resources available to member libraries.

Other Service Programs

Wis. Stat. § 43.24(2)(i) Any other service programs designed to meet the needs of participating public libraries and the residents of the system area, as determined by the public library system board after consultation with participating public libraries.

List each "other" service program individually with ongoing activities and new or priority activities for the plan year under each program. For instance, if the system provides a bookmobile service program, list ongoing activities and new or priority activities for the bookmobile program. (Do not lump miscellaneous activities under a single "other" program.)

Administration

- The system will not expend more than 20 percent of state aid received in the plan year for administration.
- The system will submit the 2019 system audit to the Division no later than September 30, 2020.
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Budget

- The system completed and included the budget by service program category and fund source for the plan year ([see guidelines](#)).
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	COLLABORATIVE ACTIVITIES	
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Summary of Activities *Briefly describe collaborative activities with other libraries, public library systems, and other organizations. Exclude services and activities listed in the system's 2020 resource library contract.*

In 2019, MCFLS collaborated with Bridges and Kenosha Library Systems to provide cybersecurity training through a vendor called KnowBe4. Staff are tested and trained regularly each month to be better aware of malicious threats through email. MCFLS also has worked with Bridges and Lakeshore Library Systems on a marketing campaign focused on September library card sign-up month. To our knowledge this is the first multi-system marketing campaign attempted in the state. The campaign includes a consistent message delivered through billboards, Facebook ads and radio spots aimed at increasing the number of active cardholders. Evaluation is also a part of the campaign.

In 2019, MCFLS pledged its share of LSTA resources to fund the backup project being coordinated by staff at SCLS and others. The system's participation in the Dell purchasing group statewide will save our members a great deal of money on the purchase of new computers and hardware.

MCFLS continues to contribute to statewide projects through the WLA. The system funded multiple scholarships to the WLA Leadership Institute and offered continued financial support for WLA lobbying activities at the state level.

The system will continue to collaborate with other systems to provide support for Trustee Training Week which continues to grow in popularity. The system also offers financial support for the Wild Wisconsin Winter Web Conference. The collaboration with SEWI to provide high quality continuing education for our member libraries is extremely valuable and a model for the state. The system also collaborates and offers tech support and assistance for Tech Days each September.

Cost Benefit *For each activity above, list the activity name and estimated cost benefit realized.*

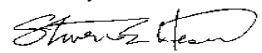

Activity	Amount
1. Marketing collaboration	\$10,000
2. KnowBe4 Cybersecurity training	\$17,000
3. Statewide Dell purchasing	\$15,000
4. Trustee training week	\$1,500
5. Wild Wisconsin Winter Web Conference	\$1,500
6. SEWI Continuing Education	\$15,000
7. Tech Days	\$2,500
8. WLA Projects	\$10,000

Cost Benefit For each activity above, list the activity name and estimated cost benefit realized.


Activity	Amount
9. Statewide backup collaboration	\$5,000
10.	
Cost Benefit Total	\$77,500

CERTIFICATION

WE, THE UNDERSIGNED, CERTIFY that to the best of our knowledge, the information provided in this document and any attachments is true and correct, and that the system will be in full compliance with all applicable provisions of Chapter 43 of the Wisconsin Statutes for the year **2020**.

Name of System Director Steve Heser	Signature of System Director ➤ 	Date Signed Mo./Day/Yr. 9/30/2019
Name of System Board President Paul M. Ziehler	Signature of System Board President ➤ 	Date Signed Mo./Day/Yr. 9/30/2019

**FOR DPI USE
LIBRARY SYSTEM PLAN APPROVAL**

Pursuant to Wis. Statutes, the plan contained herein is: <input checked="" type="checkbox"/> Approved <input type="checkbox"/> Provisionally Approved See Comments. <input type="checkbox"/> Not Approved See Comments.	DLT Assistant Superintendent Signature ➤ 	Date Signed Mo./Day/Yr. 11/6/2019
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Comments

PUBLIC LIBRARY SYSTEM 2020 ANNUAL PROGRAM BUDGET					
Program	2020 Public Library System Aid	System Aid Carryover and Interest Earned	Other State and Federal Library Program Funds	All Other Income	Total
Technology, Reference, and Interlibrary Loan*					
1. Technology	\$518,128	\$5,000	\$11,200	\$1,063,657	
2. Reference	\$178,457				
3. Interlibrary Loan	\$36,450				
4.					
5. Electronic Resources	\$161,305	\$35,000		\$303,588	
Program Total	\$894,340	\$40,000	\$11,200	\$1,367,245	\$2,312,785
Continuing Education and Consulting Service*					
1. Continuing Education	\$48,190				
2. Consulting	\$73,976				
Program Total	\$122,166	\$0	\$0	\$0	\$122,166
Delivery Services	\$325,269				\$325,269
Library Services to Special Users	\$7,254				\$7,254
Library Collection Development					\$0
Direct Payment to Members for Nonresident Access	\$1,085,020			\$52,916	\$1,137,936
Direct Nonresident Access Payments Across System Borders					\$0
Library Services to Youth	\$4,003				\$4,003
Public Information	\$65,394				\$65,394
Administration	\$341,792				\$341,792
Subtotal	\$1,828,732	\$0	\$0	\$52,916	\$1,881,648
Other System Programs					
1. Multi-type	\$8,081				\$8,081
2. Member Office	\$2,000			\$47,500	\$49,500
Program Total	\$10,081	\$0	\$0	\$47,500	\$57,581
Grand Totals	\$2,855,319	\$40,000	\$11,200	\$1,467,661	\$4,374,180

*These programs may be divided into subprograms at the discretion of the system. If choosing not to use subprograms, enter amounts on line 1. Line 5 is reserved for the amounts budgeted for electronic resources ([see program budget guidelines](#)).