



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.

MCFLS is in its first year of a wide-ranging set of directives laid out in a 2020-2024 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. This system plan reflects this shift in priorities.

MCFLS is challenged to meet these needs and as a result has restructured 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 has forced the system and members to continually re-evaluate this investment. State and county aid levels will remain flat for 2021 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 working with all our members to seek more consistent circulation policies while respecting their autonomy as individual libraries.

The COVID-19 pandemic has created a new set of challenges for the system and member libraries. The pandemic put more emphasis on the need for electronic resources and technology to put access in the hands of patrons, particularly in the spring of 2020. This renewed emphasis convinced all the members to reinvest in the OverDrive Advantage program for the first time in several years. Recently the system and members have discussed ways to assist school-age children and their parents handle learning in an online environment. The system has also investigated ways for more contact-less services to patrons, including an online patron account renewal form. The circumstances brought on by the pandemic has made it even more clear that the system and members will need to be creative to meet the needs of our communities.

The pandemic has also brought with it financial instability for both system and members. While there is no evidence that cuts will be looming to state aid, that could change after the 2020 election. Members are affected in a similar way. Some have reported little to no change in their budgets for 2021, but many expect some shift in their finances, perhaps as late as 2022. In addition, the recently 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 as a result 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 3rd Library Directors Advisory Council (LDAC) meeting and invited to make comment and suggest changes either via email or at a weekly update meeting between September 3rd and 21st. The plan will be presented to the MCFLS Board for approval in September 2020.

GENERAL INFORMATION (cont'd.)

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 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 is 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.

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

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 **2021**. 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>

ASSURANCES (cont'd)

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>

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 37% 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 2021.

*MCFLS contracts with the Milwaukee Public Library to provide centralized cataloging for all materials in the system.

*MCFLS also contracts with the Milwaukee Public Library to act as a clearinghouse for all Interlibrary Loan (ILL) requests for member libraries. The MPL staff member managing ILL services communicates regularly with the system and DPI on matters relevant to ILL and resource sharing.

*Last year 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.

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

*MCFLS has approved the purchase of network equipment to replace existing CISCO gateway routers at member libraries. Five will be replaced in late 2020 and the remainder will be replaced in 2021 and 2022.

*As part of the strategic plan, system staff plan to begin the process of an integrated library system (ILS) review in late 2020 and into 2021. Review state environment, technology environment and system requirements for an ILS software vendor.

*System staff will create a variety of easily accessible and usable training opportunities and resources for member library staff.

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:

Laurie Freund, Bridges Library System. Email: ljfreund@bridgeslibrarysystem.org

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 WiseNet. 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):

*The MCFLS system website will be fully transitioned to Wordpress in late 2020 but the pandemic and further work may push this to 2021. Plans to upgrade the CountyCat splash screen are also in the works and we hope will be completed in 2021.

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:

The following services agreements are available at <https://mcfls.libguides.com/admin/system-agreements-planning>

- Bridges and MCFLS Intersystem Agreement
- Eastern Shores and MCFLS Intersystem Agreement
- IFLS and MCFLS Intersystem Agreement
- Lakeshores and MCFLS Intersystem Agreement
- MCLS and MCFLS Intersystem Agreement
- NFLS and MCFLS Intersystem Agreement
- OWLS and MCFLS Intersystem Agreement
- WRLS and MCFLS Intersystem Agreement
- WVLS and MCFLS Intersystem Agreement

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:

ASSURANCES (cont'd)

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, 2021, if the system amended the plan since last submitting it to the Division or if the plan on file with the Division is no longer valid. See [the Library System Technology and Resource Sharing plan webpage](#) for the most current version of the system library technology and resource sharing plan.

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:

*MCFLS has approved the purchase of network equipment to replace existing CISCO gateway routers at member libraries. Five will be replaced in late 2020 and the remainder will be replaced in 2021 and 2022.

*As part of the strategic plan, system staff plan to begin the process of an integrated library system (ILS) review in late 2020 and into 2021. Review state environment, technology environment and system requirements for an ILS software vendor.

*System staff will create a variety of easily accessible and usable training opportunities and resources for member library staff.

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:

Steve Heser, Director: Statutory compliance, library administration, annual reports, technology.

Hieu Tran: Network architecture, technology and network equipment recommendations and purchasing.

Jen Schmidt: ILS configuration for libraries (authentication, loan rules, etc)

Judy Kaniasty: Delivery

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

We would like to work within the the PLSR framework to offer more consultation options to members.

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 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. The system has also worked 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.

ASSURANCES (cont'd)

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 2020 system audit to the Division no later than September 30, 2021.

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 2021 resource library contract.*

In 2020 MCFLS led a group of library systems including Bridges, Kenosha, South Central and Winnefox to provide cybersecurity training through a program called InfoSec IQ and paid through LSTA funding for three years. This on the heels of a very successful cybersecurity collaboration with many of the same systems in 2019/20. Staff are tested and trained regularly each month to be better aware of malicious threats through email. We hope that our group will act as a model for similar projects across the state.

The system's participation in the Dell purchasing group statewide has saved our members a great deal of money on the purchase of new computers and hardware. We've seen more investment by libraries in technology as a result, improving their ability to serve patrons with up-to-date resources.

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.*

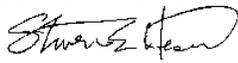
Activity	Amount
1. InfoSec IQ Cybersecurity training	\$5,000
2. Statewide Dell purchasing	\$15,000
3. Trustee training week	\$1,500
4. Wild Wisconsin Winter Web Conference	\$1,500
5. SEWI Continuing Education	\$15,000
6. Tech Days	\$2,500
7. WLA Projects	\$10,000
8.	

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

Activity	Amount
9.	
10.	
Cost Benefit Total	\$50,500

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 **2021**.

Name of System Director Steven E. Heser	Signature of Svsstem Director ➤ 	Date Signed Mo./Day/Yr. 9/21/2020
Name of System Board President Paul M. Ziehler	Signature of System Board President ➤ 	Date Signed Mo./Day/Yr. 9/21/2020

**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. 10/26/2020
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Comments

PUBLIC LIBRARY SYSTEM 2021 ANNUAL PROGRAM BUDGET					
Program	2021 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	\$532,369	\$22,000	\$10,000	\$1,026,126	
2. Reference	\$178,457				
3. Interlibrary Loan	\$36,450				
4.					
5. Electronic Resources	\$167,808			\$334,757	
Program Total	\$915,084	\$22,000	\$10,000	\$1,360,883	\$2,307,967
Continuing Education and Consulting Service*					
1. Continuing Education	\$39,765				
2. Consulting	\$75,514				
Program Total	\$115,279	\$0	\$0	\$0	\$115,279
Delivery Services	\$325,728				\$325,728
Inclusive Services	\$7,405				\$7,405
Library Collection Development					\$0
Direct Payment to Members for Nonresident Access	\$1,056,468			\$49,079	\$1,105,547
Direct Nonresident Access Payments Across System Borders					\$0
Youth Services	\$4,034				\$4,034
Public Information	\$66,115				\$66,115
Administration	\$354,455				\$354,455
Subtotal	\$1,814,205	\$0	\$0	\$49,079	\$1,863,284
Other System Programs					
1. Multitype	\$8,251				\$8,251
2. Member Office	\$2,500			\$61,600	\$64,100
Program Total	\$10,751	\$0	\$0	\$61,600	\$72,351
Grand Totals	\$2,855,319	\$22,000	\$10,000	\$1,471,562	\$4,358,881

* 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](#)).