



STRATEGIC PLAN 2015-2017

Introduction

The Bridges Library System mission is to improve member libraries through leadership, collaboration, and support. The strategic service goals and initiatives in this plan represent our library system's planned effort to concentrate our attention in the areas identified by the library system board, library system staff, and library system library directors as most important to move the organization forward in a rapidly changing environment. An effort was made to list new initiatives or ones that need more attention. It's important to note that simply because an existing service or program does not appear in this plan, it should not be perceived as an indication that the library system isn't committed to continuing to provide that service. Because the organization has limited resources, it is critically important that the attention and resources be allocated in a manner that allows for both a continuation of existing successful programs and services and moving forward very specific areas identified for attention. Waukesha County Federated Library System (WCFLS) transitioned to a two county library system when Jefferson County joined on January 1, 2016. The new name for the library system is Bridges Library System.

Overview of Planning Process

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

In December 2014, WCFLS hired WiLS (Wisconsin Library Services) to develop and facilitate a system strategic planning process. At the same time three other public library systems in Wisconsin also hired WiLS for their strategic planning processes. WiLS and Joshua Morrill, Morrill Solutions Research (MSR), developed a public library system services survey for the four library systems (see Appendix A). The survey was developed to both inform each system's planning process and serve as a platform for identifying potential regional and statewide system collaboration opportunities among public library systems.

Through a partnership with the Wisconsin Department of Public Instruction (DPI) Division for Libraries and Technology, the survey was funded in part with a grant from the Institute of Museum and Library Services (IMLS) which administers the Library Services and Technology Act (LSTA).

The system services survey was administered to WCFLS libraries from April 6 to April 17 of this year. All sixteen Waukesha County member libraries and eight Jefferson County libraries completed the survey. On May 15, 2015, an all-day strategic planning meeting with Waukesha and Jefferson library directors, WCFLS board trustees and system staff was held at the New Berlin Public Library. WiLS facilitated this meeting, which reviewed the results of the system services survey and identified member library service aspirations. This information and discussion led to the participants identifying potential strategic directions, service goals and initiatives for WCFLS.

From the information and ideas gathered during the planning meeting, WCFLS staff, with assistance from WILS, developed a draft framework of strategic directions, service goals, initiatives and activities including identifying necessary resources and a timeline. A draft of the strategic plan was provided to the member libraries and WCFLS board for further feedback. With this input, WCFLS staff drafted this final version of the plan for presentation to the WCFLS board for approval at their July 2015 meeting.

Environmental Scan

The Waukesha County Federated Library System (WCFLS) was established under Chapter 43 of the Wisconsin Statutes by action of the Waukesha County Board of Supervisors in January 1981. WCFLS is an agency of the county as well as a state-funded library system and operates under the authority of a seven member board of trustees.

The Waukesha County Federated Library System is one of the 17 library systems in Wisconsin. The vision of Wisconsin library systems is to provide all Wisconsin residents with access to the high-quality library service needed to meet personal, work, educational, and community goals. Library systems do this by providing services that strengthen and improve member libraries. No county or public library is required to be a member of a library system, yet all of Wisconsin's 72 counties and 387 public libraries are library system members.

To participate in a library system, a public library agrees to certain membership requirements, including the commitment to serve all system residents equitably. In return, the library system provides a wide range of services, tailored to regional needs that enhance local library service. This relationship provides all residents of the state with improved library service, as well as the ability to use whichever library or libraries best serve their needs.

In return for agreeing to the membership requirements, local libraries and their patrons benefit from system membership because state aid enables library systems to:

- expand and improve access to materials and resources through management of an automated, shared catalog and through interlibrary loan services
- provide specialized staff consulting as well as continuing education opportunities to local library staff and trustees
- facilitate delivery services and communications
- guarantee mutual borrowing privileges and monitor reimbursement for service to residents across county lines
- expand the use of new technologies
- support cooperative services and projects in response to regional needs
- encourage enhanced, regional networking opportunities among public, school and academic libraries
- facilitate and promote library services to users with special needs

For the Waukesha County Federated Library System, as with all library systems in Wisconsin, the vast majority of funding for its operations comes from the state of Wisconsin appropriated by the Department of Public Instruction through the Division for Libraries and Technology (DLT). All library systems receive state funds allocated on a formula basis. The formula is based upon population,

geographic area, and the level of local library funding. State funding for library systems was reduced 10% in 2011 and has been held at that reduced level since that time, making it increasingly difficult for library systems to achieve their goals and objectives.

Even though Waukesha County Federated Library System has been a County department since its inception and operates within the County operational structure, no Waukesha County funding is used to provide Waukesha County Federated Library System services. The funding from the Waukesha County library levy is distributed to public libraries as a reimbursement for providing library services to residents who live in Waukesha County communities without libraries. Only the residents of the 19 municipalities without their own libraries pay the county library tax. The remaining library municipalities are exempt from the county library levy provided they certify that they will tax themselves locally at a higher mill rate than that of the county. Non-library community residents are taxed based on their usage of libraries. They do not contribute to capital costs. The funds collected from the library levy are distributed by the Federated Library System to the libraries that serve the citizens from the taxed areas.

In the summer of 2014, the state agency charged with the oversight of the state's public library systems, the Department of Public Instruction's Division for Library and Technology (DLT), began a process to examine the structure and efficiencies of the statewide library system. The DLT-appointed LEAN study committee offered a plan for managing change in library systems that could result in improved effectiveness, increased efficiencies and more opportunities for collaborations. While there is still discussion about exactly what changes might be recommended as well as how to implement any such changes, it is expected that some changes in library systems' structure, requirements, and operations will be suggested in the coming years.

In late 2014, neighboring Jefferson County's county library board approached all of its four adjacent library systems to inquire about the possibility of a different library system affiliation. Jefferson County, currently a member of the Mid-Wisconsin Federated Library System (comprised of Washington, Dodge, and Jefferson Counties), was seeking to examine alternative library system choices. Their study concluded with the recommendation that Jefferson County withdraw from Mid-Wisconsin Federated Library System in favor of partnering with another library system. Their first choice for a new library system affiliation was Waukesha County Federated Library System.

After careful study and consideration, both the Jefferson County and Waukesha County Board of Supervisors approved a two-county partnership for the Federated Library System that would begin operations officially on January 1, 2016. A new name for the library system will need to be selected, new by-laws written, and new trustee appointments made.

This plan attempts to articulate the important directions for our library system during a time of historic change.

Strategic Plan 2015-2017

Approved by WCFLS Board July, 2015

Bridges Library System Vision

The citizens who live within the library system service area will benefit from a high quality of life when they have vibrant, accessible, connected libraries – ones that are anchors in their communities, offer easy access to a vast body of information, are well managed, and are innovative in their approach to providing library services. Strong libraries foster an environment where people can discover, create, learn, share, and grow and also provide a significant return on investment, improving the well-being of the individual and the community.

Bridges Library System Statement of Purpose

“Improving member libraries through leadership, collaboration, and support”

Strategic Directions

FUNDING:

- ❖ Focus on finding additional funding opportunities and reducing member library costs which will strengthen the libraries’ ability to meet their mission and sustain evolving library needs.

ADVOCATE:

- ❖ Work to earn respect and support of everyone in our community, including non-users and people in positions who may be able to improve the libraries’ and library system’s ability to meet its mission.

COMMUNITY:

- ❖ Help libraries in their process of transforming into vital community centers that improve the health of our communities and engage our citizens.

TECHNOLOGY:

- ❖ Provide technology support and leadership that will offer member libraries a stable operational environment and seek to maximize the potential of current hardware and software, positioning the library system to offer an innovative approach to future technology developments.

SUPPORT:

- ❖ The system will strive to provide support to library staff members and library boards by offering professional consulting and by fostering supportive environments.

Communication and Assessment

- The Library System director will annually report on progress of the strategic plan to the Federated Library System board, member libraries, Waukesha County Executive, Jefferson County Administrator, County Library Board/Planning Committee and other stakeholders during the life of the plan.
- The Federated Library System staff will meet monthly to assess and measure progress.

Strategic Direction I

FUNDING: Focus on finding additional funding opportunities and reducing member library costs which will strengthen the libraries' ability to meet their mission and sustain evolving library needs.

Service Goal

- A. Seek additional funding opportunities beyond existing traditional sources to sustain evolving library needs.

Action Steps

1. Use the Wisconsin Foundation Directory to investigate available grant opportunities and share opportunities with library directors.
2. Create webpage of tools and resources of grant opportunities.
3. Provide consultation to member libraries for grant applications.
4. Discuss and determine changes to mini grant opportunities with library system state aid funding.
5. Develop a resource kit for approaching private companies for sponsoring programs or projects.
6. Provide a CE workshop on fundraising for local library projects and capital improvements.

<i>Timeline:</i> Action steps 1, 3, and 4 are ongoing throughout plan; Step 2 December 2015; Step 5 December 2016; Step 6 December 2016

<i>Resources:</i> Staff, online resources, computer software, budget allocation

<i>Performance Measure:</i> WCFLS applies for one additional grant opportunity outside of the LSTA program by December 2017. At least four member libraries apply for a grant opportunity by December 2017.

Service Goal

- B. Reexamine county library funding formulas to ensure equity.

Action steps

1. Convene County Library board/planning committee to review county formulas as a part of updating the county library plan of service.
2. Monitor library usage and patterns under the new federated library system structure to identify whether or not there are any significant disparities among library lending and borrowing patterns.

<i>Timeline:</i> Convene committee by December 2016; Step 2 is ongoing
--

<i>Resources:</i> Staff, reports

<i>Performance Measure:</i> A county library plan of service is prepared and approved by two county boards. If there is a significant imbalance in borrowing patterns, an investigation of a possible revision in funding formulas begins in 2017.
--

Service Goal

- C. Reduce member library and library system costs to allow maximum return on investment for budget dollars.

Action steps

1. Negotiate with vendors at every opportunity to leverage buying power and reduce costs.
2. Examine potential for ongoing reduction in operating expenses and potential increased revenue to reduce member library costs when possible.
3. Investigate local, regional and statewide partnerships and memberships to explore service collaborations and participate in cooperative purchasing opportunities to create economies of scale that add potential revenue and/or save money through cost sharing or increased discounts.
4. Investigate LEAN training for at least one library system staff member.

<i>Timeline:</i> Ongoing for Steps 1-3; Step 4 by June 2017
<i>Resources:</i> Staff
<i>Performance Measure:</i> Reduce member library costs by at least 7% by January 2016. Staff member trained in Lean principles will present Lean concepts to member libraries at one directors' meeting.

Strategic Direction II

ADVOCATE: Work to earn respect and support of everyone in our community, including non-users and people in positions who may be able to improve the libraries' and library system's ability to meet its mission.

Service Goal

- A. Politically advocate for public library and the library system at all levels.

Action steps

1. Host listening sessions for elected officials at member libraries.
2. Develop talking points from the state library legislative agenda and distribute to member libraries.
3. Evaluate and improve promotional materials that are distributed at Legislative Day.
4. Develop--and encourage libraries to develop--relationships with state and local politicians by making regular contact with decision makers and their staff.
5. Coordinate and fund a READ poster project with legislators and other community influencers.
6. Identify opportunities for the staff, friends and trustees of the system and member libraries to participate on statewide committees or membership groups.
7. Be engaged in the Department of Public Instruction (DPI) Division for Libraries and Technology process to reimagine library systems and update Chapter 43.
8. Investigate the possibility of adding additional measurement metrics to gather data that better reflects the services provided by libraries for future annual reports.

<i>Timeline:</i> Step 5 by January 2016; All other steps are ongoing
<i>Resources:</i> Staff, budget allocation
<i>Performance Measure:</i> Hold at least one listening session at a library by December 2015. Supply READ posters to WLA by January 2016 for their anniversary of the association for legislative day in February.

Service Goal

B. Educate library system staff and member library staff on advocacy.

Action steps

1. Conduct a CE workshop on advocacy for library staff, friends and trustees on communicating with government representatives.
2. Investigate and share PLA’s Project Outcome initiative that will launch on June 26 to learn how to better measure outcomes.
3. Increase the advocacy information on the website for library staff on listening sessions, candidate forums and other resources.

<i>Timeline:</i> Ongoing; Step 1 completed by December 2016; Step 3 by December 2015
<i>Resources:</i> Staff, budget allocation
<i>Performance Measure:</i> One CE workshop will be held.

Service Goal

C. Communicate the relevance and value of libraries and educate the community about library initiatives.

Action Steps

1. Create (or further develop) marketing templates for system products and services that libraries can brand for their own use.
2. Develop and provide branding for the new Federated Library System.
3. Develop and provide marketing for an expanded CAFÉ catalog.
4. Formulate and fund a campaign designed to create awareness of library services, resources and community impact.
5. Convene a focus group comprised of users and nonusers to gather input to give direction to system wide marketing efforts.
6. Investigate access to advanced data analytics tools for member library use.

<i>Timeline:</i> Steps 2 and 3 by the end of November 2015
<i>Resources:</i> Staff, budget allocation
<i>Performance Measure:</i> Hire a staff member or contract for marketing services.

Strategic Direction III

COMMUNITY: Help libraries in their process of transforming into vital community centers that improve the health of our communities and engage our citizens.

Service Goal

A. Assist libraries in becoming an incubator of ideas within their community.

Action steps

1. Investigate community-building concepts, such as makerspace, and how the library system could assist in developing them in local libraries.
2. Fund presenters for rotating public library programs geared toward adults.

<i>Timeline:</i> December 2017
<i>Resources:</i> Staff, budget allocation
<i>Performance Measure:</i> Create a plan for a community-building program. Contract with one presenter for adult programming.

Service Goal

B. Assist libraries with projects of significant local importance.

Action steps

1. Stay abreast of digitization opportunities and share information with libraries.
2. Study the concept of creating a library system-funded grant program to assist with financing innovative local projects with lasting impact, such as a digitization project.
3. Help connect libraries to appropriate industry experts as needed to assist with library initiatives.

<i>Timeline:</i> Ongoing
<i>Resources:</i> Staff, software
<i>Performance Measure:</i> One library will begin a digitization project of local documents.

Service Goal

C. Assist libraries to partner with their community organizations by providing support and leadership around collaborations and partnerships to broaden connections and maximize impact.

Action steps

1. Actively seek out mutually beneficial partnerships at the library system level that may offer an opportunity for local library community connections.
2. Provide system-wide outreach to promote library services to the public.
3. Develop tools and resources to facilitate community engagement to help libraries identify and align services with community aspirations.

<i>Timeline:</i> Ongoing
<i>Resources:</i> Staff, budget allocation, community profiles software
<i>Performance Measure:</i> Six community outreach presentations or community events will be provided. Have three libraries successfully have a community organization put a book carousel on their website.

Strategic Direction IV

TECHNOLOGY: Provide technology support and leadership that will offer member libraries a stable operational environment and seek to maximize the potential of current hardware and software, positioning the library system to offer an innovative approach to future technology developments.

Service Goal

- A. Provide sound and robust technology infrastructure and support for basic operations to help libraries utilize technology to operate effectively.

Action steps

1. Provide standardization of backbone equipment to ensure a stable wide area network.
2. Investigate other library system models for supporting local technology needs in libraries.
3. Work with WiscNet and BadgerNet to monitor and assist, as necessary, efforts to increase library bandwidth and decrease costs.
4. Library system Automation Coordinator and CAFÉ administrator will consult with member libraries on standards for hardware and software.

<i>Timeline:</i> Ongoing; Step 2 by June 2016
<i>Resources:</i> Staff, budget allocation
<i>Performance Measure:</i> All libraries will have a plan for IT support needs.

Service Goal

- B. Maximize use of current technologies and system functionalities to increase output potential and service opportunities for libraries.

Action steps

1. Offer increased number of continuing education and training opportunities related to technology.
2. Investigate what reports are being generated in other consortia in Wisconsin.
3. Perform study of centralized cataloging options and implement feasible recommendations.
4. Improve accuracy of the Polaris catalog for a more efficient patron experience by funding and hiring professional cataloger.
5. Convene a committee to recommend to CAFÉ Council policies that can be standardized
6. Commit funding for a pilot project to add additional digital copies of materials at the system level.

7. Share with member libraries ways to maximize CAFÉ software, for example, by producing and sharing short screencasts of features and procedures of CAFÉ.
8. Create a customer survey on Café satisfaction.

<i>Timeline:</i> Steps 3, 5 and 6 by December 2015; Step 4 by July 2016; Steps 2 and 7 by December 2016; Step 1 ongoing
<i>Resources:</i> Staff, budget allocation
<i>Performance Measure:</i> At least 75% of patrons are satisfied with their Café experience.

Service Goal

- C. Provide leadership by exploring innovative technology applications.

Action steps

1. Create and share reports of content discussed at workshops and conferences and solicit feedback on what new technology areas should be investigated.
2. Further incentivize library staff subscriptions to the library system e-newsletter.
3. Encourage library staff subscriptions to WISPUBLIC, library system listservs, and other relevant mailing lists.
4. Investigate and recommend for purchase appropriate 3rd party software that integrates with the Polaris catalog, such as e-commerce and Evanced.

<i>Timeline:</i> Ongoing; Step 2 by June 2016
<i>Resources:</i> Staff, budget allocation
<i>Performance Measure:</i> Staff will provide 6 workshop/conference reports. Newsletter subscriptions will increase by 25% by December 2017.

Strategic Direction V

SUPPORT: The system will strive to provide support to library staff members and library boards by offering professional consulting and by fostering supportive environments.

Service Goal

- A. Continue to invest in Library System staff professional development to ensure the system provides high-quality, professional level consulting.

Action steps

1. Ensure that each library system employee has a training plan established to provide professional development and to ensure that services are delivered with competence and skill.
2. Ensure that each library system employee understands and can identify the county’s core values of Collaboration, Ethics and Integrity, Innovation, Teamwork, Efficiency, Communication, Diversity, Seeking Cost Savings and High-Quality Customer Service.
3. Ensure that system staff members all believe that information and knowledge are shared openly in the organization.

<i>Timeline:</i> Ongoing
<i>Resources:</i> Staff
<i>Performance Measure:</i> 100% of the staff respond affirmatively to the County's employee survey questions on core values, goals and information sharing.

Service Goal

B. Ensure that Library System staff stay connected with member libraries.

Action steps

1. Library System staff will incorporate library visits in their annual goals.
2. Provide consulting, expertise and leadership on library related topics, and produce and share a list of areas of staff expertise.

<i>Timeline:</i> Ongoing
<i>Resources:</i> Staff, budget allocation
<i>Performance Measure:</i> Each professional system staff will visit 8 libraries per year.

Service Goal

C. Provide opportunities and foster an environment where collaboration and learning flourish.

Action steps

1. Produce a library directory identifying key staff in each library in the system.
2. Include more library sharing stories in e-Newsletter and on website.
3. Increase number of face-to-face meetings around areas of expertise in libraries, for example, adult reference librarians.
4. Convene a directors' retreat for the SEWI area.
5. Increase system director and staff availability to attend local library board meetings.
6. Invite local trustees to subscribe to the newsletter.
7. Study how to make Gale Courses (or a similar product) a sustainable library service.
8. Encourage libraries to integrate a professional development plan with staff evaluations.

<i>Timeline:</i> Step 1 by March 2016; Step 4 by December 2015; All other steps ongoing
<i>Resources:</i> Staff, budget allocation
<i>Performance Measure:</i> 2 feature stories and 2 library profiles will be included in the monthly newsletters. 50% of Library Directors will attend the directors' retreat.

Appendix A

WCFLS System Services Survey

The following common and unique system service statements were provided to the libraries in Waukesha and Jefferson Counties. The Waukesha County libraries provided feedback by indicating their satisfaction with the services provided by WCFLS and indicating the importance of the different service statements to their libraries. Since they have not been a part of WCFLS, Jefferson County libraries only provided feedback regarding the importance of the different service statements to their libraries. The results of the survey was used to inform the development of the strategic directions and service goals.

List of common statements

Provide professional library consulting

Common statements:

1. Provide expertise and consulting to assist with planning, developing, and evaluating services.
2. Developing and maintaining partnerships with other agencies and organizations on behalf of the member libraries.
3. Provide consultation related to local library issues as requested.

Provide & support library technology

Common statements:

4. Providing technical expertise and consulting.
5. Providing assistance with and support for essential member library technology services.
6. Providing and supporting a stable and robust network for technology services.
7. Providing leadership and information on trends in the areas of technology.

Provide and manage ILS

Common statements:

8. Providing a shared ILS that meets the needs of the member libraries and their patrons.
9. Utilizing a decision-making process for ILS decisions that meets the needs of the member libraries and the system.
10. Developing and utilizing a formula for cost-sharing among member libraries that is clear and equitable.
11. Training library staff on ILS procedures and protocols.
12. Providing leadership, information on trends and potential enhancements to the ILS.

Provide Secondary ILL & “Back-up” reference

Common statements:

13. Providing a secondary ILL service that meets the needs of the member libraries and their patrons.
14. Training on creating and managing interlibrary loan requests.
15. Providing leadership and information on trends in the areas of reference and secondary ILL.

Coordinate and provide physical delivery

Common statements:

16. Providing a delivery service that meets the needs of the member libraries and their patrons.
17. Developing and utilizing a formula for cost-sharing among member libraries that is clear and equitable.
18. Training library staff in delivery procedures.
19. Providing leadership and information on trends in delivery.

Coordinate electronic resources

Common statements:

20. Sharing information with member libraries and representing the interests of the system in statewide initiatives including the Wisconsin Public Library Consortium.
21. Developing and utilizing a formula for cost-sharing among member libraries that is clear and equitable.
22. Providing leadership and information on trends in the area of electronic resources

Coordinate and provide continuing education

Common statements:

23. Determining the continuing education needs that are of greatest interest to member libraries.
24. Providing continuing education opportunities through webinars
25. Providing in-person continuing education opportunities at a location within a reasonable driving distance.
26. Evaluating CE opportunities.

Manage system administration, funding, and overhead

Common statements:

27. Providing a continuous mechanism for member library feedback about system services.
28. Sharing clear and comprehensive budget information with member libraries.

List of unique statements

- Unique 1: Developing and providing marketing toolkits for system-wide efforts.
- Unique 2: Providing leadership around state-level planning and legislative issues.
- Unique 3: Determining the special needs services that are of greatest interest to libraries.
- Unique 4: Facilitating collaborations with appropriate agencies that serve special populations.
- Unique 5: Assisting member libraries in implementing best practices related to early literacy.
- Unique 6: Providing coordinated planning and services development for summer library programs.
- Unique 7: Providing programs that encourage collaboration with schools.
- Unique 8: Encouraging the standardization of policies and procedures among ILS participants.
- Unique 9: Ensuring that current high quality records are present in the ILS.
- Unique 10: Coordinating system-wide access to electronic resources and databases beyond those provided by state initiatives such as WPLC and BadgerLink.

Other questions

In addition to the common and unique system service statements, the libraries were asked for their feedback regarding specific new services/initiatives that WCFLS could provide for member libraries, their thoughts about funding centralized cataloging, and any other general concerns or topics they wanted addressed as part of the planning process.

Question 1:

Below is a series of statements about new services/initiatives that WCFLS is considering. For each of the statements, please indicate the perceived importance of the service to your library, assuming that the service would be delivered in a satisfactory manner. Rate your importance on a scale of 0 (not at all important) to 6 (highly important). Additional labels are provided as guides to your rating.

Response 1: Providing technical support for individual library computers.

Response 2: Providing assistance with and support for essential member library technology services.

Response 3: Providing assistance in marketing and promoting local programs and services.

Response 4: Developing customized promotional materials (text editing, graphic layout, printing).

Response 5: Designing and developing websites for libraries.

Response 6: Providing training and expertise for social media tools.

Response 7: Establishing competency guidelines for member library staff on using system-provided technology services.

Response 8: Enforcing standards for ILS use in the shared environment.

Response 9: Ensuring that lending between members is equitable.

Response 10: Consulting and advising on ILS workflows and practices.

Response 11: Assisting member libraries with applying for grants.

Response 12: Providing centralized original cataloging service.

Response 13: Providing grant funding for special needs services.

Response 14: Providing grant funding for local technology improvements.

Response 15: Improving workflow of secondary interlibrary loan process.

Question 2: If WCFLS offered a centralized cataloging service, would you be willing to pay a percentage of the per item cataloging cost?

Question 3: This survey will be used to help develop the planning meeting that will be held on May 15. Do you have specific concerns or topics you would like to see discussed at that meeting? (Please note: not all of the topics you specify here will be discussed. We will review all comments to determine recurring themes that may need further discussion.)

Question 4: Is there anything else you'd like to tell us?