**Manitowoc-Calumet Library System**

**Long-Range Plan**

**2012 – 2014**

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**Developed by the MCLS Long-Range Planning Committee**

Participants:

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Cheryl Kjelstrup, MCLS Board of Trustees

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Prepared: September 2011 to January 2012

Approved by the Manitowoc-Calumet Library System Board on January 25, 2012

**Executive Summary**

The Manitowoc-Calumet Library System Long-Range Plan for 2012-2014 was developed with the vision and commitment of theMCLS Long-Range Planning Committee in the closing months of 2011. The planning committee consisted of MCLS employees: Ginger Brochtrup and Rebecca Petersen, MCLS member library Directors: Julia Davis, Jeff Dawson, Chris Moede, Cherilyn Stewart, Steve Thiry, and Barb Weber, and MCLS Board of Trustees members: Cheryl Kjelstrup and Ray Mueller. This document will serve as the first of its kind. No evidence of a pre-existing long range plan was found prior to beginning this process. Each planning session was facilitated by Mary Kohrell, UW Extension Community Development Educator for Calumet County.

The purpose of creating a strategic plan is to identify MCLS’s strengths and weaknesses, thereby providing guidance and future direction to MCLS’s Board of Trustees, staff, and member libraries for the upcoming three years. By participating in the facilitator-led process for planning, the committee was able to establish a number of strategic issues that will guide the organization’s future activities and efforts.

The long-range planning process included a stakeholder analysis (page 3); and a revised mission statement (page 3):

The mission of the Manitowoc-Calumet Library System is to provide services that support, improve, and promote the member libraries, ensuring access for all residents of the system area.

The planning process identified six strategic issues, ordered by perceived importance to committee members. Goals and action steps to address each of the strategic issues were devised by planning committee.

Strategic Issue 1: What is the best future organizational structure for MCLS (and other library systems in Wisconsin) that balances available resources, legal requirements, and patron needs?

Goal 1.1: Understand what other states and regions do in terms of library system operation

Goal 1.2: Community and patron needs are understood by MCLS

Strategic Issue 2: What can MCLS do to assure there is adequate funding to provide services to our member libraries in the future?

Goal 2.1: Advocacy efforts between system and local libraries are coordinated to maintain good relations with state and local officials

Goal 2.2: Multiple sources of funding will be explored and understood based on prioritized funding needs.

Goal 2.3: The community supports MCLS and local libraries and is willing to engage in advocacy on behalf of the system

Strategic Issue 3: How will MCLS assess and keep up with future technology expectations, needs, and concerns so that member library and patron expectations are met within fiscal constraints?

Goal 3.1: ILS system is managed in accordance with needs

Goal 3.2: Bandwidth is expanded to meet broadband needs

Goal 3.3: MCLS Staff will keep updated on new technologies and funding sources

Strategic Issue 4: What can MCLS do to remain valued by the public, elected officials, member libraries, and trustees?

Goal 4.1: Marketing plan is developed that includes outreach strategies for the public, elected officials, member libraries, and trustees

Goal 4.2: Open communication among MCLS and member staff

Goal 4.3: Trustees have a clear understanding of their roles and responsibilities

Strategic Issue 5: How can library collections be maintained and shared equitably for patrons?

Goal 5.1: Library collections are maintained and shared per LARS agreement

Goal 5.2: Effective resource management is practiced

Strategic Issue 6: What can be done to attract and retain high quality staff?

Goal 6.1: Member libraries, Boards and MCLS staff are satisfied with working environment

Goal 6.2: Long range plan is actively used

**MISSION STATEMENT:**

Mission statements should be brief and focus on one critical purpose rather than being an overall explanation of the organization. A mission statement is the “What” of an organization, strategies are the “how,” and vision is what the organization looks like if the mission is being carried out. The Long-Range Plan Committee modified the prior MCLS mission statement to a more concise statement:

**The mission of the Manitowoc-Calumet Library System is to provide services that support, improve, and promote the member libraries, ensuring access for all residents of the system area.**

**MCLS STAKEHOLDERS:**

A stakeholder is any person, group, or organization that can place a claim on the organization’s resources, attention, or output, or is affected by its output. Internal stakeholders directly belong to the organization, and external stakeholders are outside of the organization but closely affiliated with it. MCLS Long-Range Plan Committee members brainstormed this topic and developed the following list of internal and external stakeholders.

**Internal**

* Libraries within the System
* Directors of member libraries
* MCLS staff
* Staff of member libraries
* Resource library
* MCLS Board
* Local library Boards
* Funders

**External**

* Funding
* Funding entities including City, County State, Federal, LSTA funding
* Residents of Calumet - Manitowoc
* Library community
* Division libraries [DLTCL] DPI
* City and County governments
* WiscNet
* Other library systems, especially South Central
* Local school systems
* Special libraries (hospital, university, private law firms, historical societies/museums, churches)
* Patrons
* Legislators

**STRATEGIC ISSUES**

A strategic issue is a fundamental challenge affecting an organization’s mandates; mission; product or service level and mix; clients or users; costs; financing; organization; or management. Strategic issues can be current issues that require immediate attention; Issues that will require attention in the near future; and issues for which it is unclear whether any action needs to be taken now or in the future, but which need to be monitored.

Long-Range Planning Committee Members brainstormed as many important issues that will affect MCLS in the future as could be identified. Following this process, the issues were lumped into 6 categories. Committee members then voted to determine their highest (5 pts), medium (3 pts), and lowest priority (1 pt) issues on the list. Categories are listed below in rank order, which helps focus time and efforts on the most important issues. For issues not receiving any votes, it does not imply they’re not important, rather, that they’re less important than the others.

1. **Possible Future Structural changes (26)**

**What is the best future organizational structure for MCLS (and other library systems in Wisconsin) that balances available resources, legal requirements, and patron needs?**

* Adequate resources with dwindling resources
* Flexibility; willingness to adapt and seek opportunities for improvement
* Keep enough of system in place so not to confuse Patrons
* Combining systems
* Changes in state statutes
* Future of systems in Wisconsin
* Continuation of MCLS

1. **Money (21)**

**What can MCLS do to assure there is adequate funding to provide services to our member libraries in the future?**

* Funding
* Willingness to remain open making necessary changes according to outside factors – problem solving
* Flat local and system budgets
* Reduction in State funding
* Grant money
* Budget (loss of funds)
* Funding!!! Budget

1. **Technology (20)**

**How will MCLS assess and keep up with future technology expectations, needs, and concerns so that member library and patron expectations are met within fiscal constraints?**

* ILS improvements/changes
* Technology issues: Cost, keeping up to date, and staff training
* Advancement/changes in technology
* Technology (keeping up)
* Keeping pace with changing information technologies
* change from physical books over to electronic formats
* Patron access to services online
* Increased broadband
* Equal access to e-content, e-books, video, music
* Bandwidth improvement
* Maintain internet access
* Technology concerns: Hardware/software policy
* Improve patron access to higher internet speeds
* Affording and maintaining high quality internet access (e-books, internet, delivery)
* Affordable access to adequate broadband
* Adequate internet/broadband for needs and desires of staff and patrons

1. **Advocacy (9)**

**What can MCLS do to remain valued by the public, elected officials, member libraries, and trustees?**

* Public perception of library value
* Education for local libraries
* Maintain dedicated trustees; continuity of leadership and knowledge base
* Educate public and legislators about library services and the value of those services to/for the public
* Meeting needs of all public libraries in system

1. **Sharing (4)**

**How can library collections be maintained and shared equitably for patrons?**

* Maintaining local control of ILS
* Maintaining delivery
* Delivery service
* Maintaining ease of access to sharing collections for patrons
* Ensuring equitable service
* Maintaining ILS

1. **Staffing (0)**

**What can be done to attract and retain high quality staff?**

* Retain employee base
* Providing services with smaller staff resources
* Staff training
* Maintain continuity of system staff and member library directorship
* Quality staff

**Goals and Action Plan 2012-2016**

**Strategic Issue 1: What is the best future organizational structure for MCLS and other library systems in Wisconsin that balances available resources, legal requirements, and the needs of the community?**

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| **Goal** | **Actions** | **Deadline** | **Responsible Party** |
| Goal 1.1: Understand what other states and regions do in terms of library system operation | Examine other library systems in other states to determine how they are organized | Ongoing | MCLS Director, MCLS member library directors, and MCLS Board of Trustees |
| Examine other library systems in Wisconsin, including their services and the feasibility of a statewide ILS system | Ongoing | MCLS Director, MCLS ILS/IT Specialist, MCLS member library directors, and MCLS Board of Trustees |
| Monitor what the State of Wisconsin (SRLAAW) is doing | Ongoing | MCLS Director and MPL (Resource Library) Director |
| Consider the feasibility of combining services with other libraries in the area. (share services and become a larger entity). Explore contract benefits and liabilities and determine legalities/liabilities. (LARS) \*\*May result in a consultant fee if those services become necessary\*\* | 2012 – Joint ILS Discussion  Ongoing-future considerations | All MCLS staff, MCLS Board of Trustees, MCLS member library directors, and LARS |
| Goal 1.2: Community and patron needs are understood by MCLS | Individual libraries will continue to monitor patron needs as services are delivered, with this information shared with MCLS | Survey will be administered annually, prior to the July MCLS Board meeting | All MCLS staff, member library directors, and all staff members of the member libraries |
| Obtain and utilize results of statewide survey of the general public on library use being conducted by professional organization | 1st quarter of 2012 | MCLS Director, MCLS member library directors, and MCLS Board of Trustees |
| Determine what individual member libraries expect from MCLS | Survey administered annually, prior to the July MCLS Board meeting | MCLS Director |

**Strategic Issue 2: What can MCLS do to assure there is adequate funding to provide services to our member libraries in the future?**

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| **Goal** | **Actions** | **Deadline** | **Responsible Party** |
| Goal 2.1: Advocacy efforts between system and local libraries are coordinated to maintain good relations with state and local officials | Attend Library Legislative Day meeting | Meeting held Annually | MCLS Director, MCLS member library directors, and MCLS Board of Trustees |
| Attend SRLAAW meetings | Ongoing | MCLS Director and MPL (Resource Library) Director |
| MCLS Director and local library directors should encourage Board members to get engaged with elected officials | Ongoing | MCLS Director and member library directors |
| Library directors and boards have regular communication with state and federal legislators, such as letters, e-mails, and attending local/county meetings sponsored in the district with federal and state elected representatives (Liebham, Petri, etc) | Ongoing | All MCLS staff, MCLS Board of Trustees, MCLS member library directors, and MCLS member library boards of trustees |
| Goal 2.2: Multiple sources of funding will be explored and understood based on prioritized funding needs. | Determine and prioritize funding needs | July 2012  Annually | MCLS Director, MCLS member library directors, and MCLS Board of Trustees |
| Explore grants for library services | Ongoing | MCLS Director and MCLS member library directors |
| Explore private/corporate sponsorships (example: United Community Card), especially for special or targeted projects. Note: Local libraries may be tapped to fund special projects for the System. | Midyear 2012  Ongoing | MCLS Director |
| Goal 2.3: The community supports MCLS and local libraries and is willing to engage in advocacy on behalf of the system | Educate patrons about services and what they can do to help support the library’s services (WiscNet example) | Ongoing | All MCLS staff, MCLS Board of Trustees, MCLS member library directors, and MCLS member library boards of trustees |

**Strategic Issue 3: How will MCLS assess and keep up with future technology expectations, needs, and concerns so that member library and patron expectations are met within fiscal constraints?**

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| **Goal** | **Actions** | **Deadline** | **Responsible Party** |
| Goal 3.1: ILS system is managed in accordance with needs | Staff training and education on a continuing basis | Ongoing | MCLS Director and MCLS ILS/IT Specialist |
| Keep abreast of ILS changes and advances | Ongoing | MCLS Director, MCLS ILS/IT Specialist, and member library directors |
| Interact with E-library community and LARS Consortium | Ongoing  Consortia Sig and Cosugi Conferences held annually | MCLS Director, MCLS ILS/IT Specialist, member library directors, and LARS |
| Goal 3.2: Bandwidth is expanded to meet broadband needs | Staff training and education on a continuing basis | Ongoing | MCLS Director, MCLS ILS/IT Specialist, and member library directors |
| Explore separation from ESLS  \*\*Current cost estimates -first year - $47,725 and $24,150 for each succeeding year\*\* | Late winter/early spring 2012 | MCLS Director, MCLS ILS/IT Specialist, MCLS Technology Committee, MCLS Board of Trustees, MCLS member library directors, and MCLS member library boards of trustees |
| Advocate for continuation of WiscNet | 2012-2014  Ongoing | All MCLS staff, MCLS Board of Trustees, MCLS member library directors, and MCLS member library boards of trustees |
| Goal 3.3: MCLS Staff will keep updated on new technologies and funding sources | Maintain WiLS, WPLC, WISCAT memberships | Renewed annually  Ongoing | All MCLS staff, and MCLS member library directors |
| MCLS staff will keep local library boards informed about current technology issues. | Ongoing | MCLS Director, MCLS ILS/IT Specialist, and member library directors |
| Staff education on a continuing basis on technology issues | Ongoing | MCLS staff and MPL as the Resource Library |

**Strategic Issue 4: What can MCLS do to remain valued by the public, elected officials, member libraries, and trustees?**

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| **Goal** | **Actions** | **Deadline** | **Responsible Party** |
| Goal 4.1: Marketing plan is developed that includes outreach strategies for the public, elected officials, member libraries, and trustees | Utilize social media to keep libraries in the public eye (MCLS role is to advocate all of the libraries in the system) | Ongoing | MCLS Director and MCLS ILS/IT Specialist |
| Utilize newspapers and other print media to promote events such as speakers series | Ongoing | MCLS Director and MCLS Administrative Assistant |
| Marketing plan communicates the values of the system | Midyear 2012 | MCLS staff and MCLS member library directors |
| Develop a clearinghouse of events for the public | 2012  Ongoing | MCLS Director |
| Marketing plan delineates appropriate outreach for member library staff, community, officials, etc. | 3rd quarter, 2012 | MCLS staff and MCLS member library directors |
| Marketing plan incorporates components of Goal 2.1 regarding outreach and communication with elected officials. | 2012  Ongoing | MCLS staff and MCLS member library directors |
| Goal 4.2: Open communication among MCLS and member staff | Maintain open, clear communication among individual libraries, staff and MCLS | Ongoing | All MCLS staff, member library directors, and all staff members of the member libraries |
| Goal 4.3: Trustees have a clear understanding of their roles and responsibilities | Maintain trustee training and education, building on the existing trustee handbook | 2012  Ongoing | MCLS Director, MCLS Board of Trustees, MCLS member library directors, and MCLS member library boards of trustees |

**Strategic Issue 5: How can library collections be maintained and shared equitably among member libraries?**

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| **Goal** | **Actions** | **Deadline** | **Responsible Party** |
| Goal 5.1: Library collections are maintained and shared per LARS agreement | Evaluate member collections and assess future needs | Ongoing | MCLS Director, MCLS ILS/IT Specialist, member library directors, and LARS |
| E-collections are assessed | Ongoing | MCLS Director, MCLS ILS/IT Specialist, member library directors, and LARS |
| Van delivery service is maintained | Ongoing | MCLS staff and MCLS Board of Trustees |
| Monitor and enforce LARS agreement (includes Net lending) | Ongoing | MCLS Director, MCLS ILS/IT Specialist, member library directors, and LARS |
| Follow trends in WISCAT | Ongoing | All MCLS staff, member library directors, and ILL staff members at the member libraries |
| Goal 5.2: Effective resource management is practiced | Keep member libraries abreast on new technologies | Ongoing | All MCLS staff and MPL as the Resource Library |
| MCLS is the agent/negotiator/informer for member libraries | Ongoing | All MCLS staff |
| Monitor electronic data and E-content | Ongoing | MCLS Director, MCLS ILS/IT Specialist, member library directors, and LARS |

**6. What can be done to retain high quality MCLS staff and maintain the organization?**

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| **Goal** | **Actions** | **Deadline** | **Responsible Party** |
| Goal 6.1: Member libraries, Boards and MCLS staff are satisfied with working environment | Maintain MCLS services | Ongoing | All MCLS staff and MCLS Board of Trustees |
| Maintain funding | Ongoing | MCLS Director and MCLS Board of Trustees |
| Perform regular staff evaluations | Performed annually  Ongoing | MCLS Director, MCLS Personnel Committee and MCLS Board of Trustees |
| Support continuing education (conferences, etc) for staff | Ongoing as long as the MCLS budget is adequate | MCLS Director and MCLS Board of Trustees |
| Maintain adequate working environment and equipment | Ongoing | All MCLS staff and MCLS Board of Trustees |
| Staff and directors will have fun!!!! | Ongoing | MCLS Director |
| Support continuing education (conferences, etc) for staff | Ongoing as long as the MCLS budget is adequate | MCLS Director and MCLS Board of Trustees |
| Goal 6.2: Long range plan is actively used | Use plan, evaluate its value, review it prior to annual meeting | Ongoing | MCLS Director, MCLS member library directors, and MCLS Board of Trustees |
| Regular review of long range plan at board meetings | 2012  Ongoing | MCLS Director and MCLS Board of Trustees |
| Occasional review of plan at member library director meetings (6 times/yr) | 2012  Ongoing  (6 times/yr) at Directors’ meetings | MCLS Director, MCLS member library directors |