

NFLS & OWLS Joint Strategic Plan



2023-2027

Our Missions

Nicolet Federated Library System

Provide member libraries cost effective and efficient access to resources, support, and expertise, resulting in vibrant community resources that better serve their patrons.

Outagamie Waupaca Library System

Enable access to effective library service for all area residents by coordinating resource sharing, by providing appropriate services and programs, by developing new technologies, and by promoting desirable models for governance and funding.

About NFLS and OWLS

The Nicolet Federated Library System (NFLS) is a state-funded organization assisting 15 member public libraries, through 42 library outlets, in providing better services to the people of northeastern Wisconsin since 1976. NFLS' public libraries span eight northeast Wisconsin counties: Brown, Door, Florence, Kewaunee, Marinette, Menominee, Oconto, and Shawano.

Outagamie Waupaca Library System (OWLS) is a federation of the public libraries in Outagamie and Waupaca counties. Each member library is completely autonomous, funded and governed locally, but contracts with OWLS for the purpose of coordinating and strengthening services. OWLS serves 17 member libraries.

Both systems provide, by state statute and based on member needs, similar services that include, but are not limited to, continuing education support, a variety of consulting services, technology resources and support, and connections to other libraries across the state of Wisconsin. The systems also provide services as determined by their system boards in consultation with participating libraries; in other words, NFLS and OWLS are responsive to their member needs.

Of particular note is the participation of both systems in OWLSnet, a service program of the Outagamie Waupaca Library System, allowing participating libraries in the systems to borrow materials directly from each other. This shared automation network is established, operated, and maintained under the legal authority of the OWLS Board of Trustees and administered by the OWLS director and staff. However, all participating libraries are represented on the Administrative Advisory Committee (AAC), which makes recommendations to the Board and staff regarding the administration of OWLSnet. OWLSnet offers a wide variety of wrap-around services, including a discovery layer for public access to library catalogs, ILS and related training to library staff, the telecommunications network for participating libraries, and much more.

NFLS and OWLS have a strong and growing history of working closely with each other. The inclusion of NFLS in the OWLSnet network means that patrons in both systems can access a

larger pool of library resources and is a noteworthy example of system collaboration. Building on the success of OWLSnet, the systems have increasingly aligned their services to meet member needs better. Examples of this joint approach include:

- Sharing an InfoSoup OverDrive Advantage account (excluding Brown and Menominee Counties);
- Sharing the cost of connecting independent delivery services, both outsourced to Waltco, as well as purchasing delivery tubs together;
- Providing continuing education opportunities to member libraries through the Northeastern Wisconsin CE Partnership (NEWI) partnership;
- Monitoring and making recommendations for addressing any resource-sharing inequities that may emerge between systems or between member libraries;
- Providing backup consulting support to each other's member libraries in the event of an extended absence or emergency for a system director;
- OWLS and NFLS IT staff providing backup technical support for library PCs during staff vacations and other absences;
- OWLS and NFLS marketing staff both participating in the statewide marketing cohort and collaborating in a number of informal ways; and
- Collaborating on joint grant applications.

Joint Planning Approach

With a strong culture of collaboration in place, a desire to find smart ways to deploy shared resources, and an interest in exploring cooperative opportunities, NFLS and OWLS decided to develop a joint strategic plan through a shared planning process. The systems formed a planning team of staff, trustees, and member library directors from each system to guide the planning process and develop the strategic plan. Members of the planning team were:

- Tracy Vreeke, NFLS System Director
- Bradley Shipps, OWLS System Director
- Becca Berger, NFLS Board Member
- Julia Wallace, NFLS Board Member
- Michelle Frola, OWLS Board Member
- Pete Gilbert, OWLS Board Member
- Sarah Sugden, Library Director, Brown County Library (NFLS)
- Cathy Kolbeck, Library Director, Algoma Public (NFLS)
- Katherine Freund, Library Director, Little Chute Public Library (OWLS)
- Hannah Good Zima, Interlibrary Loan / Administrative Assistant (NFLS)
- Kristin Laufenberg, Consulting and Outreach Librarian (OWLS)

Together the systems explored the needs and priorities of their unique and shared stakeholders. A joint survey was conducted, gathering insights from over 130 system staff and trustees and member library directors, staff, and trustees. Conversations were attended by member library staff and directors from both systems and other data was collected for each system to help

determine the priorities for NFLS and OWLS in the coming years. This data, and more importantly, the information provided by the system stakeholders, especially member libraries, is the foundation of the shared NFLS and OWLS strategic plan for the next five years. The following goals and objectives are shared, with many overlapping priorities and areas of collaborative exploration. The plan is intentionally flexible to allow NFLS and OWLS to meet their individual system needs.

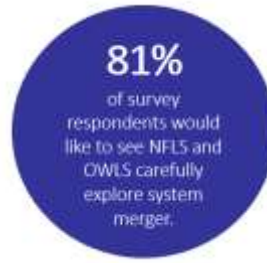
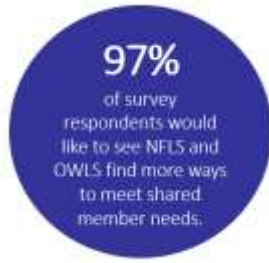
Key Takeaways from the Planning Process

Several key themes emerged through member conversations, surveys, and other data gathering. Member libraries, system staff, and other stakeholders want to see both systems continue and increase efforts to cultivate innovation at libraries and at the system level by finding ways to say yes, incubating ideas, helping members pilot services, and providing grants. There is also a clear need for the systems to maintain and increase their focus on technology and trends, which could take the form of application and equipment support, connecting member libraries to education opportunities or other experts, and identifying groups that share a technology and trend focus.

In conversations, member libraries expressed that core system services, such as delivery, ILS provision and support, continuing education, and consulting, are core for good reason. In the stakeholder survey, nearly all system services were viewed as important or very important, with the following ranked most important:

- Facilitating sharing of materials through policies and practices (e.g., ILL)
- Pay/support of delivery and sorting services
- ILS provision and support
- Annual reporting and data support
- Representing libraries on a statewide level
- Provision of network services
- Continuing education through NEWI

The fact that stakeholders value and need core system services and also desire innovations makes a clear case for NFLS and OWLS to continue looking for ways to collaborate to increase scale and find ways to leverage each other's strengths. In fact, stakeholders indicated a strong desire for NFLS and OWLS to continue and increase cross-system collaborations, with many sharing a desire to explicitly explore system merger.



When survey takers were asked for their level of agreement with the statement, “NFLS and OWLS should collaborate less,” only two respondents selected any agreement with that statement. The survey results and the long list of ways the two systems are already closely working together indicate that activities to intentionally and inclusively explore the feasibility of a merger should be built into this joint strategic plan.

With these key findings, the systems crafted a joint set of goals and objectives.

Goals and Objectives

Goal: Sustainability and Organizational Health

Provide member libraries and our library systems with the expertise, information, and advocacy needed to successfully achieve each of our missions

Objectives

- Provide expert consulting when, where, and how it is most useful
- Increase focus on providing library directors, staff, and trustees with needed training and support to help their libraries thrive
- Support organizational missions and fiscal health of member libraries and systems by coordinating advocacy and asserting library values
- Directly and indirectly advocate for local, county, statewide, and federal funding sources

Goal: Explore and Expand Collaboration

Connect NFLS, OWLS, and member libraries to ideas, opportunities, services, the larger statewide library network, and each other

- Intentionally and inclusively explore the feasibility of a merger between NFLS and OWLS
- Identify and prioritize opportunities between NFLS and OWLS to more closely align services and share work to reduce duplication of efforts
- Improve opportunities for member libraries to learn from each other, be inspired by their peers, and meet common needs together
- Increase collaboration with neighboring systems, counties, libraries, and other organizations that are mutually beneficial

Goal: Equity of Access

Ensure all member libraries have access to services and resources to ensure their communities, in turn, have the information they need when they need it

- Continue to find ways to improve ILS provision, policies and support to ensure robust, easy-to-share collections
- Innovate to sustain long-term, equitable access to stable, rapid, and efficient delivery services
- Develop and support policies and practices at the consortium level that result in equitable access to system services and responsible sharing of library resources
- Support and advocate for access to digital collections and resources that meet the growing patron demand

Goal: Technology Support and Readiness

Provide system staff and member libraries with the technology and training they require to anticipate and exceed their communities' evolving needs

- Provide technology tools, resources, and products that support member library and patron needs
- Improve user experience for applications and equipment provided or supported by the systems

Goal: Cultivate Innovation

Support innovative ideas, recognize emerging trends impacting member libraries, and find ways libraries can solve shared challenges together

- Develop pathways and remove barriers so member libraries can experiment with new ideas in timely and meaningful ways
- Connect members and system staff with trend information, tools, and learning opportunities they need to embrace innovation, anticipate community needs, and respond to subsequent service changes

Implementation and Communication

Each system will implement this joint plan in unique ways that best fit the needs of the members and the practices of the staff and board. However, both NFLS and OWLS will implement the goals and objectives of this strategic plan through a set of activities or projects. In order to allocate resources effectively, the systems may prioritize some activities to get started on in the first year of the plan and then establish an annual cycle of revisiting tabled activities, generating new ideas, and reprioritizing. In this process, the systems will look for ways to jointly and individually accomplish the goals and objectives in this plan.

The systems envision two critical joint meetings that annually generate and prioritize the following year's projects. The first will be a joint meeting of system staff in January to assess the preceding year's accomplishments and generate project priorities for the following fiscal year. This meeting will be followed by a joint meeting with system member libraries in the spring, likely in March or April, to do the same. There will be other touchpoints throughout the year, jointly and independently.

NFLS and OWLS are committed to ongoing, two-way communication with stakeholders, including member libraries, system staff, and board members, to help assess the progress of this plan and ensure the efforts are making a difference. The systems will also provide semi-annual status updates to their boards. Member libraries will be updated regularly about strategic plan implementation, including status updates on specific activities or projects, and will share updates through various system communication channels.

Acknowledgments

Without the input of member library directors and staff, this plan would not have been possible. The systems are grateful to our members who completed surveys, participated in conversations, and offered feedback on the plan draft. The system directors would also like to thank member library trustees and board members from NFLS and OWLS who took time to complete our survey and offer their expertise. Additionally, the staff of NFLS and OWLS were instrumental in this process, sharing their opinions and supporting the directors in the plan's development. In particular, the system directors would like to thank members of the planning team for their dedication to the planning process and for creating a strategic plan that represents the needs and priorities of all system stakeholders.

Finally, NFLS and OWLS thank Laura Damon-Moore, Kim Kiesewetter, and Melissa McLimans from WiLS for providing planning process management, facilitation services, and data expertise.