

# Technology and Resource Sharing Plan 2017-2020

Outagamie Waupaca Library System

March 2017

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## *Home*

### **Introduction**

The mission of the Outagamie Waupaca Library System (OWLS) is to 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.

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 does not ordinarily provide direct library service; instead, it serves patrons through their local library. (Look at [Member Libraries](#) for a complete listing of federation participants.) It is one of seventeen public library systems in the state. Each system is funded primarily by state aids, which enable the systems to carry out the service requirements set forth in [Chapter 43](#) of the [Wisconsin Statutes](#). It is also the agent designated by [Outagamie](#) and [Waupaca](#) counties to provide access to library service for all residents of the system area. Each year the system requests county funds to reimburse member libraries for serving area residents who do not have municipal library service. OWLS is governed by a fifteen member [board of trustees](#) representing both counties. The trustees, appointed for three-year terms by the counties, meet monthly.

## **The Planning Process**

Public library systems in Wisconsin are required to provide a variety of services in order to qualify for state funding. Section 43.24(2)(m) specifically requires systems to engage in "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." State required system technology and resource sharing plans are to be submitted at least every five years. However, technology plans required by the federal E-rate program are to cover a three-year period. In order to comply with state library system requirements and federal E-rate requirements, this plan covers a four-year period from January 2017 through December 2020.

Individual public libraries must have approved technology plans in order to participate in the federal E-rate program and, consequently, the TEACH Wisconsin program. Library system technology plans may be used to fulfill the requirement for individual libraries to have a technology plan as long as 1) the system's plan supports and validates the E-rate eligible services used by member libraries and 2) the system's plan is based on a collaborative planning process. The Outagamie Waupaca Library System complies with these requirements so that the system's Technology and Resource Sharing Plan can provide E-rate technology plan compliance for all member libraries.

## **Evaluation**

OWLS Director will be responsible for coordinating the evaluation of this plan. Evaluation will include a written assessment of the extent to which goals and objectives have been met. This assessment will include 1) a list of the goals and objectives that have been achieved, 2) a list of goals and objectives that have not been achieved with an explanation of why they weren't achieved, 3) suggestions for how any unmet goals or objectives might be achieved in the future, and 4) a description of any unanticipated outcomes. Input for this assessment will be solicited from OWLS professional staff and member library directors.

This plan will be discussed at the annual OWLS director's meeting and reviewed annually as part of the system's annual planning process. Any revision to this plan will include an examination of the relevance of current goals and objectives and consideration of emerging needs and new technologies.

## *Authors/Approvals*

This plan was developed by the OWLS administrative staff, with additional input and critique provided by OWLS member libraries, the OWLS Board of Trustees and variety of other sources.

OWLS professional staff meets every other week throughout the year, primarily to discuss technology-related issues. Professional staff members also meet regularly with professional staff from Appleton Public Library and Nicolet Federated Library System, and they also meet frequently with the staff of member libraries. OWLSnet Administrative Advisory Committee (AAC) meetings, which are held an average of six times during the year, are a forum for the discussion of OWLSnet technology and resource sharing issues. These discussions provided significant input and direction into the development of this plan.

System technology and resource sharing planning has not been done in isolation. OWLS staff regularly participates in statewide meetings for system technology and interlibrary loan coordinators. OWLS staff members are active in the Fox Valley Library Council, Inc., which is an organization of libraries of all types that exists to facilitate resource sharing in a seven county area. Participation enables OWLS and FVLC to integrate the other organization's objectives into their respective plans. The plan was presented to the OWLS Board and adopted on March 16, 2017.

## *Goals/Activities*

The following goals and objectives apply to all OWLS member libraries, unless otherwise specified. OWLSnet objectives are carried out in cooperation with NFLS and apply to all OWLSnet member libraries, i.e., libraries in both systems. OWLS objectives apply only to member libraries of the OWLS system.

### **Summary of Major Goals:**

- A. To provide services to OWLS and OWLSnet member libraries that help them increase patron access to library and information resources and that help increase the efficiency and effectiveness of library operations.
- B. To further develop OWLS and OWLSnet services in order to improve and enhance the services and information available to member libraries and their patrons.
- C. To facilitate effective resource sharing among OWLSnet member libraries, and between OWLS libraries and libraries beyond OWLSnet, in order to provide patrons with convenient access to library and information resources.
- D. To provide training and assistance to member library staff in using services provided by OWLS and OWLSnet.
- E. To work with the OWLSnet Administrative Advisory Committee to optimize the ongoing governance and operation of OWLSnet.
- F. To engage in continuous study and planning in regard to OWLSnet services, library automation, resource sharing, and new technologies.

Goal A: To provide services to OWLS and OWLSnet member libraries that help them increase patron access to library and information resources and that help increase the efficiency and effectiveness of library operations.

### Objectives:

1. OWLSnet will continue to provide and support Integrated Library System (ILS) software from Innovative Interfaces that offers a variety of functions to members including circulation control, a central bibliographic database, a central patron database, management reports, a discovery layer, online patron registration, e-commerce, overdue and reserve notices, resource sharing, acquisitions and SIP2 access to third party applications.
2. OWLSnet will continue to provide statistics, notices and reports to help libraries track items, report circulation, and develop collections.
3. OWLSnet will explore moving statistics to a dashboard format to increase access to statistics.
4. OWLSnet will continue to identify and support peripherals that work with the ILS software, including receipt printers, barcode scanners, label printers and signature capture devices, as well

as implementing processes that take advantage of these devices.

5. OWLSnet will continue to provide access to subscription-based electronic information resources (e.g., Ancestry, Overdrive, OneClickDigital, Tumblebooks) for all network libraries.
6. OWLSnet will continue to work with member libraries to provide enhanced information resources to patrons via InfoSoup (e.g., digital platform for local history, recently added materials database, booklists, Zinio).
7. OWLS and APL technical services staff will continually monitor and make recommendations regarding OWLSnet technical services processes. Cataloging staff will continue to focus on helping member libraries quickly and accurately add new items to the catalog, including creating original records and modifying existing records as appropriate.
8. OWLSnet will continue to provide Internet services (e.g., web access, email accounts) to member libraries.
9. OWLSnet will continue to provide email services to member libraries. Currently, we use an email/SMTP server in-house; we will consider moving to Microsoft 365, webhost based email and other options, including replacing the existing server.
10. OWLSnet will continue to provide and support the network infrastructure necessary for OWLSnet services, including firewalls, servers, telecommunications equipment, data circuits, and software.
11. OWLSnet will continue working to secure sufficient bandwidth to meet the needs of members by monitoring the bandwidth needs of member libraries, upgrading bandwidth from the BadgerNet converged network, exploring alternative bandwidth sources, and by securing adequate bandwidth to connect to an Internet Service Provider.
12. OWLSnet will continue to provide and support SAM PC management software, or an equivalent software program, in OWLSnet member libraries. We will also evaluate and explore alternatives to SAM.
13. OWLSnet will continue to provide and support wireless Internet access in OWLSnet member libraries, including providing support for wireless access points and hosting and maintenance for wireless management software.
14. OWLS will apply for appropriate telecommunications discounts that may be available to member libraries through state or federal programs (e.g., E-rate, TEACH Wisconsin).
15. OWLS will continue to provide consultation and assistance to member libraries in maintaining and upgrading computers and OWLS supported software, such as Microsoft Office.
16. OWLSnet will continue to provide and support PC maintenance software that protects the computer's configuration from changes, and antivirus software.
17. OWLS will continue to develop and maintain websites, and provide web-accessible electronic content, including website analytics.
18. OWLS will continue to provide website design and hosting for member libraries and work with member libraries using Drupal to move their sites over to a more current version of the software.
19. OWLSnet will continue to provide a VPN service to allow member libraries to use Sierra outside of the building.
20. OWLS will continue to maintain the equipment needed for printing and design services.
21. Whenever possible, OWLSnet will continue to automate reports, notices and processes to more quickly and efficiently provide services to OWLSnet member libraries.
22. OWLSnet will continue to cooperate with member libraries, Recollection Wisconsin, WPLC and DPLA to increase access to local and worldwide digitized historical content.

23. OWLS will continue to encourage the Administrative Advisory Committee of OWLSnet to standardize policies, procedures, and practices among network libraries.

Goal B: To further develop OWLS and OWLSnet services in order to improve and enhance the services and information available to member libraries and their patrons.

Objectives:

1. OWLSnet staff will continue to act as a liaison with the ILS service provider, and keep up to date on enhancements, bug fixes and new products.
2. OWLSnet, in cooperation with member libraries, will continue to develop and enhance InfoSoup.
3. OWLSnet will provide training and support to help more member libraries digitize unique local resources and share them online through Recollection Wisconsin.
4. The OWLSnet Administrative Advisory Committee (AAC) will continue to assess the desirability and feasibility of implementing additional Sierra software modules or other new services.
5. OWLSnet will regularly evaluate and work with WPLC on the current use of online electronic resource subscriptions and make any changes necessary to optimize the use and affordability of such resources.
6. OWLSnet will continue to work with member libraries to explore their participation in the acquisitions module of the Sierra ILS.
7. OWLSnet will regularly replace servers, computer room network equipment (i.e., firewalls, routers, switches), uninterruptible power supplies, and backup units.
8. OWLSnet will evaluate the Encore Discovery layer and consider alternatives.
9. OWLSnet will investigate adding an authority control service to clean up and standardize existing bibliographic records, and improve authority control on an on-going basis.
10. OWLSnet will investigate offering a printing solution for public access PCs and wireless devices in the library.

Goal C: To facilitate effective resource sharing among OWLSnet member libraries, and between OWLS libraries and libraries beyond OWLSnet, in order to provide patrons with convenient access to library and information resources.

Objectives:

1. OWLSnet will continue to allow patrons to request the interlibrary loan of items by placing holds or sending email messages via the online catalog.
2. OWLS will continue to contract for appropriate five-day-a-week delivery services between member libraries, the OWLS and NFLS offices, and other libraries throughout the state.
3. OWLSnet will continue to provide member libraries and their patrons with access to WISCAT and other library catalogs via InfoSoup.
4. OWLSnet will make its Sierra server available as a z39.50 target in order for other libraries to have access to information about member library materials.
5. OWLS and NFLS will continue to monitor resource sharing among OWLSnet members and will implement methods for addressing resource sharing inequities that exist between systems and libraries.
6. OWLS and its member libraries will continue to participate in the Fox Valley Library Council (FVLC)

in order to facilitate resource sharing with other types of libraries in the FVLC area.

Goal D: To provide training and assistance to member library staff in using services provided by OWLS and OWLSnet.

Objectives:

1. OWLSnet will continue to provide group and individual training to staff of member libraries in the effective use of Sierra software and related management reports.
2. OWLSnet will continue to provide assistance to staff of member libraries in troubleshooting problems with the use of OWLSnet services.
3. OWLSnet will continue to provide training to OWLSnet member libraries in using software to add digital collections to Milwaukee Public Library's CONTENTdm server in partnership with Recollection Wisconsin.
4. OWLSnet and OWLS will continue using GoToMeeting, GoToWebinar, and LogMeIn for providing online programs, training, collaboration, and support to member libraries.
5. OWLS will continue to provide individual training or consultation to staff of member libraries in the effective use of electronic information resources, computers, software, and other new technologies.
6. OWLS will continue to provide training and documentation to member libraries and their patrons in downloading and using the digital media available from OWLSnet and the Wisconsin Digital Library.
7. OWLS will continue to provide training to member libraries in use of social media, software, and websites (e.g., Facebook).
8. OWLS will continue to assist OWLS libraries with the development and maintenance of local library websites, including locally created web-accessible databases.
9. OWLS, upon request, will assist member libraries with local library technology plans and policies.

Goal E: To work with the OWLSnet Administrative Advisory Committee to optimize the ongoing governance and operation of OWLSnet.

Objectives:

1. Representatives of OWLS, NFLS, and all member libraries (i.e., AAC) will meet at least quarterly to discuss the technical and administrative operation of the network.
2. OWLSnet will continue to codify membership requirements, policies, and procedures and will regularly communicate them to member libraries.
3. OWLSnet will monitor member library compliance with policies, procedures, and membership requirements and will notify any library that does not comply.

Goal F: To engage in continuous study and planning in regard to OWLSnet services, library automation, resource sharing, and new technologies.

Objectives:

1. OWLS will encourage and support participation by its staff in activities to help them keep abreast of technological developments relevant to OWLS and OWLSnet services including serving on

state-wide committees.

2. OWLS staff will continue to monitor the development of social media sites and services and will make recommendations to member libraries about their participation in social media sites or services.
3. OWLS staff will keep abreast of developments in the publishing industry aimed at distributing media content electronically and will inform member libraries of such developments and their potential impact on public library services.
4. OWLS will annually review this plan and make any necessary modifications as part of its annual planning process.
5. OWLSnet will explore becoming CIPA compliant in order to be eligible for additional e-rate discounts.
6. OWLSnet will continue to follow advancements in linked data/BibFrame.
7. OWLSnet will explore mobile apps for access to shared resources.
8. OWLSnet will investigate methods to streamline support and supply requests, including adding helpdesk software.
9. OWLSnet will investigate visiting each member library site on an annual basis in order to help all libraries keep up to date on OWLSnet services, procedures and plans.
10. OWLS will investigate replacing the overhead projector in the OWLS meeting room with a large screen TV to facilitate on-site training sessions.
11. OWLS will develop and adopt a new Technology and Resource Sharing Plan. (2020)

## *Est. Budget*

The participating member libraries and systems provide the majority of funding for technology and resource sharing activities within OWLS and OWLSnet. The following 2017 budget information provides an example of the revenue that OWLS will use and the expenditures that OWLS will make to accomplish the technology and resource sharing activities described in this plan.

### 2017 Budgeted Income by Source

State Aid	\$254,746
Federal Funds	\$13,920
Local and County	\$5,000
Contracts	
OWLS Member Libraries	\$292,025
NFLS Member Libraries	\$292,016
Nicolet Federated Library System	\$267,920
Total Income	\$1,125,627

The majority of activities contained in this plan are financed from OWLS Technology-Reference-Interloan program budget. This program is divided into two subprograms. The OWLSnet subprogram includes activities involved in operating the OWLSnet shared automation consortium. The OWLS subprogram includes technology, reference, and interloan services provided primarily to OWLS member libraries. The 2017 budgets and detailed information for both subprograms follow.

### **Technology-Reference-Interloan: OWLSnet**

Salaries	\$346,397
Payroll Taxes	\$26,499
Fringe Benefits	\$116,890
Facilities	\$15,000
Telephone	\$2,500
Supplies	\$10,000
Telecommunications	\$59,400
Borrowers' Card Supplies	\$4,000
Printing & Promotion	\$1,500
PC Equipment	\$4,250
PC Repair	\$500
Meeting and Travel	\$5,000
Training/Consulting	\$1,000
Software	\$13,000
Insurance *NEW*	\$3,250
Resource Library	\$21,000
Online Databases	\$21,000
Internet Access	\$25,000
SkyRiver	\$42,500
Digitization	\$1,500
Enhanced Content	\$50,000
System Hardware	\$10,000

Network Hardware & Maint	\$85,000
Subtotal	\$1,001,186

Salaries, Payroll Taxes, Fringe Benefits: Included are the costs for approximately 7.15 FTEs.

<b>Position</b>	<b>FTE OWLSnet</b>
Cataloger	1.00
Cataloging Assistant	.725
Circulation Specialist	1.00
Computer Network Manager	.90
Computer Technician	.25
Director	.40
Assistant Director	.55
Library Services Manager	.70
Library Support Specialist	.875
Other Staff (4)	.75
<b>Total FTEs</b>	<b>7.15</b>

Facilities: 50% of OWLS rent and utilities is allocated to the OWLSnet program.

Telephone: This budget contains the costs for the telephone lines used by the automation staff.

Supplies: This includes everything from receipt paper to connectors for the ends of cables. Items like surge suppressors and printer cables get charged to this account.

Telecommunications: This budget pays for connecting remote sites to the OWLSnet WAN and connecting OWLSnet to the Internet.

Borrowers' Card Supplies: OWLSnet members are provided with borrowers' cards, patron barcodes, and barcode covers.

Printing and Promotions: Members are provided with a variety of printed and promotional items.

Computer Equipment: This budget is for PCs and peripherals for OWLSnet staff.

PC Repair: This budget is used to upgrade or repair components on OWLSnet staff computers.

Meeting and Travel: This budget covers the cost of travel to remote sites by OWLSnet staff. This account is also used to pay expenses for OWLSnet staff to attend ILS-related meetings or conferences.

Training/Consulting: This budget covers training or consulting from technology vendors.

Software: This budget is for miscellaneous software needed for OWLSnet staff PCs or for software provided to OWLSnet member libraries for their PCs.

Resource Library: Appleton Public Library serves as a resource for all OWLSnet libraries, including libraries in the OWLS and NFLS systems. This particular line item is used to purchase materials that enhance APL's ability to serve as a resource for the network.

Online Databases: These funds are used to pay for the subscription-based electronic resources that are available to libraries in both OWLS and NFLS.

Internet Access: This budget pays for Internet service for all OWLSnet libraries.

SkyRiver: This budget is for various SkyRiver costs related to cataloging.

Enhanced Content: This budget is for enhanced content for InfoSoup (e.g., cover art, reviews, booklists, etc.) and digital materials.

System Hardware: This budget is used to buy major hardware items, primarily servers, for the central computer room. The amount varies significantly from year to year depending upon annual objectives.

Network Hardware & Maintenance: This budget is used to buy equipment for the network infrastructure (e.g., routers, switches, firewalls) that may be placed in the central computer room or at libraries. The remainder of the funds are used to pay for maintenance on servers, software, switches, routers, wireless access controllers, wireless access points and other miscellaneous equipment.

System Maintenance: The biggest chunk of this budget is to pay Innovative Interfaces for software maintenance on Encore and Sierra. It also includes support for ShoutBomb text messaging.

**Technology-Reference-Interloan: OWLS**

Salaries	\$70,583
Payroll Taxes	\$5,400
Fringe Benefits	\$19,670
Facilities	\$3,000
Supplies	\$500
Equipment	\$2,050
Meeting and Travel	\$1,500
Training/Consulting	\$750
Software	\$4,250
FVLC Participation	\$500
Statewide Projects	\$54,951
Lender Compensation	\$6,000
Subtotal	\$169,153

Salaries, Payroll Taxes, Fringe Benefits: Included are the costs for approximately 1.35 FTEs. Currently, five people spend time in this subprogram: four professional employees and one support staff employee.

Position	FTE OWLS
Computer Network Manager	.05
Computer Technician	.75
Director	.25
Library Services Manager	.25
Assistant Director	.05
Total FTEs	1.35

Facilities: 10% of OWLS total rent and utilities is allocated to the OWLS program.

Supplies: This budget is for miscellaneous supplies.

Equipment: Funds in this budget pay for computers and peripherals for OWLS staff that are not primarily assigned to the OWLSnet program.

Meeting and Travel: Funds are budgeted for OWLS staff to travel to member libraries on system technology or resource sharing business.

Training/Consulting: Funds are budgeted to pay for technology training and consulting outside of the OWLSnet program.

Software: This budget contains funds for software for OWLS staff computers.

FVLC: OWLS pays Fox Valley Library Council membership dues for all of its member libraries in order to facilitate resource sharing and multitype cooperation in the area.

Statewide Projects: This budget pays for OWLS library participation in statewide technology projects, e.g., WPLC membership, digital media buying pool.

Lender Compensation: This program compensates OWLS member libraries that provide services to residents of other counties who are not compensated by those counties. Any library qualifying for compensation under this program receives a credit toward its annual OWLSnet membership fee.

## *Background*

The Outagamie Waupaca Library System (OWLS) was established in 1976 by joint resolution of Outagamie County and Waupaca County. OWLS was created to ensure that all residents of both counties would have access to convenient library service, to facilitate resource sharing, and to foster the development of local public libraries. The system serves over 240,000 people through its 16 member public libraries.

The use of developing technologies has been integral to OWLS efforts to achieve its mission. In the future, OWLS will continue to provide leadership in exploring, implementing, and supporting new technologies that assist member libraries with improving the services they provide to their patrons and with increasing efficiency in providing services.

### **Development of Services**

Since its inception, OWLS has coordinated resource sharing among member libraries and has taken a leadership role in introducing and developing new technologies. The most significant technology and resource sharing development in OWLS history occurred in 1989 when OWLS began operating a shared automation network (OWLSnet) for its member libraries. In 1995, OWLS signed an agreement with Nicolet Federated Library System (NFLS) to cooperate in providing OWLSnet services to NFLS member libraries. It was a priority for both systems to connect all member libraries to OWLSnet as quickly as possible, and that task was completed in 2000.

### **Integrated Library System**

In 2004, work began on the process of migrating to a new integrated library system (ILS). In June 2005, a contract was signed with Innovative Interfaces, Inc. to migrate to a new ILS. Data was migrated to the new system, OWLS staff provided training to the staff at OWLSnet libraries, and a new online catalog,

InfoSoup, was developed. OWLSnet libraries went live on the new system on February 21, 2006, and public response to InfoSoup has been overwhelmingly positive since the first day. Since that time InfoSoup has received many enhancements. In 2009, a version of InfoSoup for mobile devices (i.e., InfoSoup To Go) was launched, and a new Job & Career Resources page was developed. The InfoSoup Memory Project, which uses CONTENTdm software to make local library digital collections available through InfoSoup, was launched in 2009.

The Innovative Interfaces Millennium software was replaced by Innovative's new Sierra software in 2012. Sierra is used to provide circulation control, a central bibliographic database, a central patron database, management reports, an online public access catalog (InfoSoup), overdue and reserve notices, resource sharing, online patron registration, e-commerce, digital signature capture, SMS notification and acquisitions functions to members. The network also provides member libraries with training, cataloging services, technical support, a network library card program, a new materials database, various electronic resources, email service, antivirus and security software, and Internet service.

In 2015, the new Encore Discovery Layer was implemented. This is an easier to use public interface that has replaced the older Sierra WebPac (although the WebPac is still accessible.) Patrons and staff find it easier to use and staff find it easier to maintain. The new InfoSoup also allows patrons to search magazines from within the main search box, or limit to just magazines in a more targeted search. In 2016, the ability to search the Digital Public Library of America was added. Since metadata from member libraries' digital collections, hosted on Milwaukee Public Library's CONTENTdm server, are harvested by Recollection Wisconsin, which is in turn harvested by the Digital Public Library of America, this allows patrons to find local historical materials within InfoSoup.

## **Network**

In 2006, OWLSnet libraries were migrated to the state's newly developed BadgerNet Converged Network (BCN), and OWLS doubled its Internet capacity to 9 mbps. The OWLSnet network continues to connect 49 public library sites and both system offices. Forty-eight of these sites are connected directly to the OWLSnet wide area network (WAN) through the BCN. Two sites access OWLSnet resources via the Internet, and Appleton Public Library has a local area network (LAN) connection. OWLSnet has continued to add bandwidth as feasible and affordable to meet the needs of member libraries. OWLSnet has also continued to upgrade routers and switches as necessary at the central site and at member library sites.

As of 2013, most member libraries connected to OWLSnet via the BCN are connected with 3.0 mbps or 5.0 mbps circuits. Now, at the end of 2016, due to a statewide technology grant, almost all libraries are connected with to OWLSnet on fiber, via the BCN with a 10 mbps circuit. A few larger libraries have 15 or 20 mbps circuits. Only the Green Earth Branch, the Egg Harbor Branch and the NFLS office connect with a copper circuit, and plans are being made to upgrade these to fiber. As part of the new BadgerNet state contract, we are requesting that all libraries on fiber be increased to 20 mbps circuits.

In response to member library requests, OWLSnet began installing wireless networks in member libraries in 2007. Currently, 45 sites make wireless Internet service available to patrons. Also in response to member library demand, OWLSnet began offering SAM workstation management software in 2008. Currently, 37 OWLSnet libraries are using SAM to manage public Internet computers.

## **Resource Sharing**

The development of OWLSnet has led to an explosive increase in the volume of resource sharing. In 2011, over 976,000 items were shared among OWLSnet members as a result of placing and filling holds using the ILS. The workload associated with handling this volume of materials has become a significant burden for OWLS, NFLS, and many member libraries. Because the growth of resource sharing had become unsustainable, OWLSnet libraries voted in 2009 to reduce the maximum number of holds allowed to 15 per patron in order to reduce the dramatic growth in resource sharing among OWLSnet libraries. In 2012, for the first time in the history of OWLSnet, resource sharing among members decreased, and it has continued to decrease through 2016. Because of this continuing drop, in 2016 OWLSnet libraries voted to increase the maximum number of holds to 25 per patron. It is likely that this trend is the result of fewer items being added to library collections and the increasing availability and popularity of digital materials.

In late 2006, OWLS made a significant change in how resources are shared with libraries outside of OWLSnet. Prior to 2006, OWLS libraries had used WISCAT to borrow items from other libraries in the state, and OWLS operated an interlibrary loan clearinghouse to respond to requests for materials owned by OWLS libraries from libraries throughout the state. In December 2006, OWLS libraries discontinued using WISCAT and began using OCLC/BadgerCat for out-of-network resource sharing, and NFLS began serving as the interlibrary loan clearinghouse for OWLS libraries. In 2014, when OWLS moved from OCLC to SkyRiver for a bibliographic utility, OWLS libraries also moved from OCLC to WISCAT for interlibrary loan. At the same time, the clearinghouse was discontinued, and OWLS libraries now place and receive their own requests for items outside of the OWLSnet consortium.

### **Other technology services**

In addition to operating the ILS, managing the WAN, and facilitating resource sharing for member libraries, OWLS engages in a variety of other technology-related activities. Activities include providing additional electronic resources, using technology to convey information to member libraries, providing technology training, helping member libraries to create and maintain websites, providing professional technology support and consulting assistance to member libraries, providing PC support to member libraries, coordinating participation in the Wisconsin Public Library Consortium, and assisting with the development of local technology resources.

A complete assessment of services is contained in Appendix C.

### **Assessment of Current Technology-Related Services**

The following services are provided to all OWLSnet member libraries, except as noted.

- Wide area network (WAN) equipment, data circuits, and management
- Local area network (LAN) infrastructure for file and printer sharing<sup>1</sup>
- Innovative Interfaces Sierra Integrated Library System
  - Circulation control
  - Central bibliographic database

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<sup>1</sup> Appleton maintains its own local area network.

Central patron database  
Online patron registration  
Digital signature capture  
Management and statistical reports  
Overdue and reserve notices via paper, email, and SMS  
Online public access catalog (InfoSoup)  
InfoSoup To Go for mobile devices  
Resource sharing  
Z39.50 target  
Acquisitions control<sup>1</sup>  
On-site staff training  
E-Commerce module for online fine payment  
Collection Agency module

- OWLSnet library card program
- New materials database
- Internet access for staff and public
- SAM workstation management software<sup>2</sup>
- Wireless Internet access for staff and public
- Email accounts for library staff<sup>3</sup>
- Antivirus software and network security provisions
- SkyRiver
- WISCAT for interlibrary loan
- Assistance with digitization projects using CONTENTdm software to add digital collections to Recollection Wisconsin
- Staff and patron access to electronic resources
  - Ancestry Library Edition
  - Recorded Books OneClickDigital
  - TumbleBooks
  - WI Digital Library (Overdrive)
- Technical support, training, and troubleshooting

OWLS provides the following services to OWLS member libraries.

- Assistance in developing local web-accessible information resources
- Assistance with equipment purchases
- Customized individual or on-site training in the effective use of electronic resources, computer software, and the Internet
- Development and submission of technology grants and proposals to enhance member libraries services

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1 Only Appleton, New London, Door County, Waupaca, and Kimberly-Little Chute currently use the acquisitions module.

2 APL uses Envisionware software. Several libraries have elected not to implement SAM software.

3 Appleton operates its own email server, and Kaukauna uses its city's email service.

- E-rate filing
- Online continuing education and technology training opportunities for library staff
- Online training, troubleshooting, and support via Go To Meeting and LogMeIn
- PC maintenance and troubleshooting
- System wide technology planning
- Technology planning and consulting services
- Website development and hosting services
- Website development and maintenance training

## *Evaluation of 2013 – 2016 Plan*

The OWLS *Technology and Resource Sharing Plan: 2013 – 2016* contained 6 goals and 47 objectives. Significant progress was made toward achieving all of the goals during the period covered by the Plan, and only a handful of the objectives were not achieved. The Evaluation contains a list of all the objectives that were achieved with some comments to further illuminate how they were achieved. Also included in Appendix A is a list of the objectives that were not achieved and some comments about them.

The OWLS Technology and Resource Sharing Plan: 2013 – 2016 Goal Summary:

- A. To provide services to OWLS and OWLSnet member libraries that help them increase patron access to library and information resources and that help increase the efficiency and effectiveness of library operations.
- B. To further develop OWLS and OWLSnet services in order to improve and enhance the services and information available to member libraries and their patrons.
- C. To facilitate effective resource sharing among OWLSnet member libraries, and between OWLS libraries and libraries beyond OWLSnet, in order to provide patrons with convenient access to library and information resources.
- D. To provide training and assistance to member library staff in using services provided by OWLS and OWLSnet.
- E. To work with the OWLSnet Administrative Advisory Committee to optimize the ongoing governance and operation of OWLSnet.
- F. To engage in continuous study and planning in regard to OWLSnet services, library automation, resource sharing, and new technologies.

Significant progress was made toward achieving all of these goals during the period covered by the Plan. In addition, OWLS was successful in achieving all of the objectives listed below. Comments are included for some objectives to further illuminate how they were achieved.

### Achieved Objectives

- OWLSnet will continue to provide and support Sierra integrated library system (ILS) software from Innovative Interfaces that offers a variety of functions to members including circulation control, a central bibliographic database, a central patron database, management reports, an online public access catalog (InfoSoup), online patron registration, e-commerce, overdue and reserve notices, resource sharing, and acquisitions.
- OWLSnet will continue to provide access to subscription-based electronic information resources (e.g., Ancestry, Overdrive, OneClickDigital, TumbleBooks) for all network libraries.
- OWLSnet will continue to work with member libraries to provide enhanced information resources to patrons via InfoSoup (e.g., patron and staff reviews, InfoSoup Memory Project, recently added materials database, booklists).
  - Due to impending cost increases for ContentDM, OWLSnet moved InfoSoup Memory Project to a ContentDM service hosted by the Milwaukee Public Library. While branding has changed slightly, all content continues to be available at a lower cost with no restrictions on the amount of future content.

- OWLS and APL technical services staff will continually monitor and make recommendations regarding OWLSnet technical services processes.
  - In 2014, OWLS moved from OCLC as a bibliographic utility to Innovative's SkyRiver
- OWLSnet will continue to provide Internet services (e.g., web access, email accounts) to member libraries.
- OWLSnet will continue to provide and support the network infrastructure necessary for OWLSnet services, including firewalls, servers, telecommunications equipment, data circuits, and software.
- OWLSnet will continue working to secure sufficient bandwidth to meet the needs of members by monitoring the bandwidth needs of member libraries, upgrading bandwidth from the BadgerNet converged network, exploring alternatives bandwidth sources, and by securing adequate bandwidth to connect to an Internet Service Provider.
  - All OWLSnet libraries and the OWLS head end received upgrades to bandwidth during the course of the plan.
- OWLSnet will continue to provide and support SAM workstation management software, or an equivalent software program, in OWLSnet member libraries.
- OWLSnet will continue to provide and support wireless Internet access in OWLSnet member libraries.
- OWLS will apply for appropriate telecommunications discounts that may be available to member libraries through state or federal programs (e.g., E-rate, TEACH Wisconsin).
- OWLS will continue to provide consultation and assistance to member libraries in maintaining and upgrading computers, developing and maintaining websites, and providing web-accessible electronic content.
- OWLS will continue to provide website hosting for member libraries.
- OWLS will continue to encourage the Administrative Advisory Committee of OWLSnet to standardize policies, procedures, and practices among network libraries.
- OWLSnet, in cooperation with member libraries, will continue to develop and enhance InfoSoup.
- OWLSnet will provide training and support for member libraries to add unique local resources to the InfoSoup Memory Project.
- The OWLSnet Administrative Advisory Committee (AAC) will continue to assess the desirability and feasibility of implementing additional Sierra software modules or other new services.
  - In 2016, OWLSnet agreed to implement the Collection Agency module. With the passage of The Return of Library Materials bill, public libraries are allowed to use a collection agency to encourage patrons to return long overdue materials. OWLSnet libraries will be using the Sierra Collection Agency module with Unique Management Inc. to encourage patrons to return these materials.
- OWLSnet will regularly evaluate current use of online electronic resource subscriptions and make any changes necessary to optimize the use and affordability of such resources.
- OWLSnet will continue to work with member libraries to explore their participation in the acquisitions module of the Sierra ILS.
- OWLSnet will regularly replace servers, computer room network equipment (i.e., firewalls, routers, switches), uninterruptible power supplies, and backup units.
- OWLS staff will redesign the OWLS and OWLSnet websites using Drupal software and migrate them to a remote host.

- OWLSnet will investigate adding a discovery layer to better integrate the online catalog and other electronic resources that are available to patrons.
  - In 2015, OWLSnet added the Encore Discovery Layer from Innovative Interfaces to replace the aging WebPac public access catalog.
- OWLSnet will continue to allow patrons to request the interlibrary loan of items by placing holds or sending email messages via the online catalog.
- OWLS will continue to contract for appropriate five-day-a-week delivery services between member libraries, the OWLS and NFLS offices, and other libraries throughout the state.
- OWLS will evaluate the desirability of continuing to contract with NFLS to serve as the interlibrary loan clearinghouse for OWLS member libraries.
  - In 2014, OWLS moved to WISCAT for interlibrary loan from OCLC. In the process, the clearinghouse was also eliminated. OWLS libraries now place and receive requests for holds to and from libraries outside of the OWLSnet consortium,
- OWLSnet will evaluate the desirability of continuing to use OCLC for managing out-of-network interlibrary loan activity.
  - In 2015, OWLS moved to WISCAT for interlibrary loan.
- OWLSnet will continue to provide member libraries and their patrons with access to other library catalogs via InfoSoup.
- OWLSnet will make its Sierra server available as a z39.50 target in order for other libraries to have access to information about member library materials.
- OWLS and its member libraries will continue to participate in the Fox Valley Library Council (FVLC) in order to facilitate resource sharing with other types of libraries in the FVLC area.
- OWLSnet will continue to provide group and individual training to staff of member libraries in the effective use of Sierra software and related management reports.
- OWLSnet will continue to provide assistance to staff of member libraries in troubleshooting problems with the use of OWLSnet services.
- OWLSnet will continue to provide training to OWLSnet member libraries in using CONTENTdm software to add digital collections to the InfoSoup Memory Project.
- OWLSnet and OWLS will continue using GoToMeeting, GoToWebinar, and LogMeIn for providing online programs, training, collaboration, and support to member libraries.
- OWLS will continue to provide individual training or consultation to staff of member libraries in the effective use of electronic information resources, computers, software, and other new technologies.
- OWLS will continue to provide training to member libraries and their patrons in downloading and using the digital media available OWLSnet and the Wisconsin Digital Library.
- OWLS will continue to provide training to member libraries in use of social media software and websites (e.g., Facebook).
- OWLS will continue to assist OWLS libraries with the development and maintenance of local library websites, including locally created web-accessible databases.
- OWLS, upon request, will assist member libraries with local library technology plans and policies.
- Representatives of OWLS, NFLS, and all member libraries (i.e., AAC) will meet at least quarterly to discuss the technical and administrative operation of the network.
- The OWLSnet planning committee will present a new plan for consideration, modification, and

adoption by the Administrative Advisory Committee.

- OWLSnet will continue to codify membership requirements, policies, and procedures and will regularly communicate them to member libraries.
- OWLSnet will monitor member library compliance with policies, procedures, and membership requirements and will notify any library that does not comply.
- OWLS will encourage and support participation by its staff in activities to help them keep abreast of technological developments relevant to OWLS and OWLSnet services.
- OWLS staff will continue to monitor the development of social media sites and services and will make recommendations to member libraries about their participation in social media sites or services.
- OWLS staff will keep abreast of developments in the publishing industry aimed at distributing media content electronically and will inform member libraries of such developments and their potential impact on public library services.
- OWLS will annually review this plan and make any necessary modifications as part of its annual planning process.
- OWLS will develop and adopt a new Technology and Resource Sharing Plan. (2016)

While the vast majority of objectives included in the 2013 – 2016 Plan were achieved, the following objective was not achieved.

#### Unmet Objective

- OWLS and NFLS will continue to monitor resource sharing among OWLSnet members and, if necessary, will implement methods for addressing resource sharing inequities that may exist between systems and libraries.
  - Resource sharing inequities do exist between systems and libraries. These will need to be addressed in the upcoming plan.