

Notice

Milwaukee County  
Federated Library System  
Library Directors Advisory Council

Regular Meeting  
Thursday, June 2<sup>nd</sup>, 2022  
10:00 AM – 12:00 PM

*This meeting will be held:*

Online at  
Meeting URL: [CLICK HERE](#)  
Meeting ID: 898 2748 8344  
Passcode: yUdJ193t  
Telephone Passcode: 44077315

Agenda

*The LDAC reserves the right to take action on any of the items listed below.*

1. Call to order
2. Additional agenda items/adoption of agenda
3. Approval of minutes for the May 5<sup>th</sup>, 2022 LDAC meeting

Action

Action

[Attachment A](#)

### Topics Requiring Action or Discussion.

4. Member library updates related to COVID-19
  - a. [Please update MCFLS Member Libraries Current Status Document](#)
5. Discussion. Report and final recommendation from the ILS Review committee. Potential ILS cost breakdown for member libraries.

Action      [Attachment B](#)
6. Substitute staff pool follow up. [Review of form](#) and next steps.
7. Owning/Home report and comparison to new SQL reporting for reciprocal borrowing.

Distributed in Advance of the Meeting on June 1st

### Technology.

8. New Mobile App update. Mobile App Review team met May 25<sup>th</sup> to review initial settings.
9. Multi-factor authentication and Outlook 365 update from South Milwaukee.
10. InfoPass update and timeline. Steering committee met June 1<sup>st</sup>.

[Attachment C](#)

### Informational.

11. Patron Point update and process workflow

[Attachment D](#)

### Additional Business

### Member Library Updates

#### Sub-committee agendas and minutes

Circulation Services—Agenda and minutes available at <https://mcfls.libguides.com/circulation/meetings>

Youth Services—Agenda and minutes available at <https://mcfls.libguides.com/youth/meetings>

Young Adult Services—Agenda and minutes available at <https://mcfls.libguides.com/youth/yameetings>

Adult and Reference Services—Agenda and minutes available at <https://mcfls.libguides.com/adult/meetings>

#### Next Meeting

Scheduled for Thursday, August 4<sup>th</sup> at 10 am via Zoom or in-person

#### Adjournment

Milwaukee County Federated Library System  
Library Directors Advisory Council  
Regular Monthly Meeting held Thursday, May 5, 2022  
Zoom Meeting Software

Present: Amy Krahn, St. Francis Public Library  
Dana Andersen-Kopczyk, Brown Deer Public Library  
Susan Draeger-Anderson, North Shore Library  
Michael Koszalka, West Allis Public Library  
Stephanie Lewin-Lane, Hales Corners Public Library  
Jill Lininger, Oak Creek Public Library  
Pete Loeffel, Wauwatosa Public Library  
Tristan Marshall, South Milwaukee Public Library  
Matthew Murphy, Milwaukee Public Library  
Sheila O'Brien, Greenfield Public Library  
Nyama Reed, Whitefish Bay Public Library  
Rebecca Roepke, Cudahy Family Library  
Brian Van Klooster, Greendale Public Library

Excused: Jennifer Loeffel, Franklin Public Library

MCFLS Staff: Steve Heser, Director  
Judy Kaniasty, Business Manager  
Jen Schmidt, Library Systems Administrator

Call to Order. Chair Krahn called the regularly scheduled monthly meeting of the Milwaukee County Federated Library System Board of Trustees Library Directors Advisory Council to order at 10:02 a.m.

Additional Agenda Items/Adoption of Agenda. Chair Krahn inquired whether there were any additions to the agenda and these were suggested:

- Chromebooks/Sheila O'Brien
- TBS Easy Scan Public Copier/Rachel Collins
- Lending Streaming Devices/Brian Van Klooster
- Hoopla Content/Steve Heser

Rachel Collins moved and Brian Van Klooster seconded a motion to approve the agenda as modified. Unanimously approved.

Approval of Minutes for the April 7, 2022 LDAC Meeting. Chair Krahn referred to the minutes of the April 7, 2022 meeting which are shown as Attachment A of the agenda packet. Being no corrections noted, Susan Draeger-Anderson moved and Rachel Collins seconded a motion to approve the minutes as presented. Unanimously approved.

TOPICS REQUIRING ACTION OR DISCUSSION

Member Library Updates Related to COVID-19.

Please update MCFLS Member Libraries Current Status Document. Chair Krahn reminded all to update the current status document as changes are made regarding COVID-related matters at member libraries. Some libraries have started to put out a few toys and water fountains are opening up. Most libraries still are limiting the number of computers open as a means for social distancing and most libraries still have the plastic guards in place to protect staff at checkout desks.

Discussion: Revisiting Idea of Sharing a List of Librarian Substitutes for Short-Term Work. Steve Hesel reported that Susan Draeger-Anderson suggested this topic be discussed since she had a challenging time recently finding librarian substitutes when North Shore had three vacancies. Steve Hesel has since learned that Bridges Library System has a form on their website for librarians to indicate their availability and wonders whether the LDAC would like MCFLS to also do something like that? MCFLS would be willing to share a list derived from a form on the MCFLS website, if there is enough interest.

[Jill Lininger arrived at 10:11 a.m.]

Susan Draeger-Anderson noted that she ultimately reached out to UW-M School of Library Science and they steered interested students to her. Rachel Collins also likes the idea of sharing names of current staff members interested in helping out and recent retirees too.

[Pete Loeffel arrived at 10:17 a.m.]

It was decided to discuss this topic at next month's meeting after a form is generated for discussion. Brian Van Klooster suggested consideration be given to starting with seeking interest from within member library staff/retirees first since those people would know the internal operations within MCFLS and that point was well received.

Proposal to Form a Workgroup for an LDAC Guidelines Review. Steve Hesel referred to the current LDAC Guidelines, shown as Attachment B of the agenda packet and asked for two volunteers to review the document and suggest changes to be reviewed at a future meeting. Sheila O'Brien and Brian Van Klooster volunteered to work with Steve Hesel.

Proposal to Change Language to Library User Agreement for Digital Signatures. Steve Hesel referred to Attachment C of the agenda packet which Emily Vieyra, from Shorewood, asked to be discussed/modified since a patron pointed out to her that it isn't practical to ask patrons to notify libraries immediately but rather promptly when address changes or lost cards occur.

Rebecca Reopke questioned whether an age range could be listed for young people, second last bullet, and it was determined that that varies per library so one could not be narrowed down.

Brian Van Klooster moved and Rachel Collins seconded a motion to approve the modifications as recommended. Unanimously approved.

DPI Update.

LSTA CE Grant Funding. Steve Hesel urged member libraries to apply by May 16<sup>th</sup> by using the link provided on the agenda packet to submit applications for staff continuing education expenses for the first six months of 2022 directly to Bridges Library System who is the system running the project on behalf of the SEWI libraries. West Allis is eligible for \$1,300; Milwaukee is eligible for \$3,000 and the rest of the MCFLS member libraries are eligible for \$1,100 each. Steve Hesel noted that SEWI System

Directors are looking for ways in which to spend any unclaimed funds and ideas are: up to \$3,000 for ALA scholarships and/or an annual subscription to MRA which is an on-demand video training platform for \$1,400.

LSTA Five Year Plan being Developed. Steve Hesel reported that he recently participated in the system director meeting with DPI and he shared concepts of three main goals for LSTA funding that were determined for 2023-2037: PLSR and DPI priorities; staff support and collaboration building. SRLAAW and COLAND will also be providing feedback into the drafting of the document.

Library Program Tracker. Steve Hesel reported that a new reporting tool is now available where the annual report information is located. New annual report categories for 2022 are also noted which is helpful knowing in advance so statistics can be kept.

Amy Krahn questioned whether the WISEgrants portal is open yet and Steve Hesel responded that each member library has \$2,400.92 in ARPA Infrastructure Grant funds and invoices for acceptable purchases should be forwarded to Judy Kaniasty for MCFLS to seek reimbursement. Judy Kaniasty noted she would send out reimbursements in one or two groupings so to keep audit documentation easy to find.

## TECHNOLOGY

ILS Review Update. Jen Schmidt updated the LDAC on progress being made and yet to be made in the ILS Review project which is winding down in June when the final recommendation is projected to be presented to the LDAC and then move onto the MCFLS Board. Jen Schmidt reviewed Exhibit 1 attached to these minutes which reflects tasks performed/to be performed by Jen Schmidt and the ILS Review Committee from April-June, 2022. The two finalists are Sierra and Symphony/BLUEcloud.

Sheila O'Brien questioned whether there was any sense to member library costs for 2023 and beyond based on this activity and Steve Hesel responded that it is his top priority to keep costs from going up and it is hoped to lower costs based on this activity. Sheila O'Brien thanked MCFLS for all of the work involved in this process and for the careful attention to details/costs.

Request for formal motion to approve MCFLS Privacy Policy and refer back to MCFLS Board. Steve Hesel referred to the MCFLS Privacy Policy again, shown as Attachment D of the agenda packet noting that the MCFLS Board asked for LDAC action on this policy before they approve it at their May 16 meeting. Being no further discussion on the document, Rachel Collins moved and Tony Frausto seconded a motion to approve/recommend MCFLS Board approval. Unanimously approved.

Update on Microsoft software licensing changes. Steve Hesel reviewed the Microsoft software licensing changes which is shown as Attachment E of the agenda packet which was also done a few months ago. MCFLS recommends libraries purchase Microsoft software licenses through CDWG which offers a State Licensing Program pricing structure, as a cost-saving alternative option for public machines. The WPLC Tech Steering Committee is also looking for additional cost-saving options and Steve Hesel will share any information that is shared from that group.

## INFORMATIONAL

Inclusive Services Update. Jen Schmidt referred to a link to the survey on the DEI efforts taking place within the System. Rachel Collins expressed her appreciation for the survey and liked the ranking ability contained within it. Jen Schmidt noted that Anne Rasmussen will share the survey results with the State Inclusive Services Committee.

### Workforce Partnerships.

Digital Literacy Lab grant with Employ Milwaukee. Steve Hesel reported that he was asked for a letter of support for this project and he was happy to do so, but that does not tie MCFLS or its members to anything. The program is for 2 hours for four weeks with free training and participants get a free computer—either a chrome book or desktop when they complete the program. The training is done in labs with a virtual instructor and in-person assistants onsite. MPL did pilot and now the invitation is being extended to the suburbs—space is what libraries commit to (10-12 computers at minimum) and Employ Milwaukee provides the staffing. Reach out to Steve Hesel if you are interested in being contacted by Employ Milwaukee. The grant is being sent to expand the program but knowing interest level would be helpful.

WISHRM Outreach. Steve Hesel inquired whether any member library had been contacted yet by WISHRM and it appeared that none had so Steve Hesel will reach out to them for more details.

Job Center tour for library staff. Steve Hesel reported that he attends monthly meetings with Job Center administrators and with Employ Milwaukee too. Steve Hesel noted that he had attended a tour of the UMOs job center in the past and found it very interesting and he wonders whether there might be interest by member library staff to attend a tour themselves? There was interest by directors and it was felt adult services staff might also benefit so Steve Hesel will get a tour lined up.

Jen Schmidt questioned how things are going at member libraries that have a table in their library manned by Workforce Development staff? Greenfield and Shorewood both indicated that the tables are well received and patrons seem pleased to see the collaboration. Steve Hesel noted that if any other libraries are interested in this program to let him know.

### ADDITIONAL BUSINESS

Chromebooks. Sheila O'Brien questioned whether any member libraries have partnered with their local schools with granting chrome book usage in their libraries? Both Whitefish Bay and Greendale indicated that they are and things work well and shared how things are structured in their individual library settings.

TBS Easy Scan Public Copier. Rachel Collins commented that she is looking to perhaps replace their public copying situation with hopefully an easier solution. Brown Deer had some significant problems with their trial but found a workaround. Rachel noted she would contact TBS for more information.

Lending Streaming Devices. Brian Van Klooster reported that he has seen libraries in other systems lending ROKU and he wonders if any member library has considered also doing that? Discussion ensued and it was unclear how to work around accounts, passwords and preloaded content. Brian will investigate further.

Hoopla Content. Steve Hesel reported that he had become aware of there being some titles of controversial topics in Hoopla and those items have or are being removed. Steve Hesel noted that MCFLS has no control over content and that he would reach out for more information but he wanted all member libraries to be aware of the fact that things did slip through unintentionally in case anyone asks.

Rachel Collins questioned whether Hoopla is worth the expense paid due to very low circulation. Steve Hesel indicated that he would generate usage statistics for further discussion at a future meeting.

## MEMBER LIBRARY UPDATES

Milwaukee – Matt Murphy noted that the rare and archival materials request form is up and running on their website with the Special Collections team reviewing/addressing applications at [mplarchives@milwaukee.gov](mailto:mplarchives@milwaukee.gov)

Greendale – Brian Van Klooster reported that he is planning a big community-wide program called Human Library which is also happening in other communities. In summary, it is a four-hour event where volunteers with experiences of prejudice are paired with an interested person to hear their story; training will be provided. Volunteers are needed and he will send out an email to the LDAC.

Shorewood – Rachel Collins indicated she would be planning a good-bye lunch after the next LDAC meeting on June 2. Applications are due by Monday morning in the search for her replacement.

SUB-COMMITTEE AGENDAS AND MINUTES. Links shared on the agenda to the Circulation Services, Youth Services, Young Adult Services and Adult & Reference Services agendas and minutes.

NEXT MEETING. Scheduled for Thursday, June 2, 2022 beginning at 10 via Zoom Meeting Software.

ADJOURNMENT. With no further business to be addressed, Brian Van Klooster moved and Dana Andersen-Kopczyk seconded a motion to adjourn the meeting at 12 noon. Unanimously approved.

## Final Recommendation for the Integrated Library System of the Milwaukee County Federated Library System

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May 2022



## Introduction

From March 2021-May 2022, the Milwaukee County Federated Library System (or MCFLS) worked with staff from several member libraries to embark on a formal evaluation of our current integrated library system (or ILS) product, Sierra. This task was identified as an important activity from the [MCFLS 2020-2024 Strategic Plan](#) (see *Service Goal B: User Experience, page 6*). The need for the project was especially true given that MCFLS has been under contract with Innovative Interfaces, the same ILS vendor for over twenty years. The ILS, sometimes referred to as library automation software, consists of functional areas that follow the process of ordering, processing and displaying new library materials to their eventual set up for public access and for item checkout and renewal, as well as usage reporting.

The charge of the ILS Review project included the following:

- Research to find an economical ILS that offers core software functionality to all members.
- Evaluate whether or not the existing Sierra product serves our members well, and identify if MCFLS should continue to stay with the current vendor, Innovative Interfaces, Inc.
- Assess the pros and cons of Sierra AND other viable automation products in terms of
  - Its compatibility short and long term with MCFLS's other software and hardware (currently MCFLS has two on-site servers dedicated to the ILS as well as a physical server to support phone notifications using iTiva)
  - the flexibility of the ILS to integrate with key third-party products whether those products are used collectively by MCFLS or by individual libraries.
  - its ability to manage both traditional materials and e-resources of members and make them highly accessible and findable to the public.
  - its ability to offer a high level of custom list creation and statistical reporting for a consortium that all members are used to.

MCFLS constructed an ILS Task Force comprised of member staff working in both technical and public services. As our largest member and resource library, it requested that the Milwaukee Public Library (MPL) provide three-five staff from its acquisitions, cataloging, serials and IT departments. The group met exclusively online with meetings being held typically twice a month except in January and February 2022 when there were no scheduled meetings.

## The MCFLS ILS Review Task Force

- Alan Her, Milwaukee Public Library
- Heidi Muehlhausen, North Shore Library
- Karli Pedersen, Milwaukee Public Library
- Kenya Biami, Milwaukee Public Library
- Jennifer Schmidt, MCFLS
- Matthew Murphy, Milwaukee Public Library
- Sam Molzhan, Franklin Public Library
- Steve Hesel, MCFLS
- Theresa Hoge, Whitefish Bay Public Library

## Summary of the ILS Review Process

During the first few meetings, the group did some initial research and identified four viable ILS candidates to evaluate. These companies and their products are listed below.

Company	Staff Software Product	Public Catalog Product
The Library Corporation (TLC)	CARL-X	CARL-Connect
Sirsi-Dynix	Symphony/BLUEcloud	Enterprise
Innovative Interfaces	Polaris	Vega
Innovative Interfaces	Sierra	Vega

To find worthwhile companies warranting further investigation, the task force discussed the Marshall Breeding [Library Technology web site](#) looking at the current migration and reverse migration trends of library automation companies as they pertain to larger public library consortia. They also reviewed a [recent online questionnaire](#) completed by other Wisconsin Public Library Systems detailing which ILS products they used, when their last system evaluation took place and what they found to be serious contenders for their member libraries. Resources about each product were gathered and placed onto a new [MCFLS Libguides web page](#). A timeline of specific activities was also created to help direct the work of the group while enabling anyone from the MCFLS community to track the progress of the project.

Here is a summary of the steps taken during the ILS Review project. Library staff feedback was sought out at several points during the process.

- The ILS Task Force participants were assigned one or more functional areas they were responsible for. They identified training content online for each product, wrote up lists of needed ILS functions and generated questions for each product.
- MCFLS staff created surveys on Sierra and Encore, our current ILS products. This was done to gauge the effectiveness of the products as well as the system's overall readiness to possible change.
- A Request for Information (RFI) document was created that included the detailed lists of functionality by work area. This went out to all four companies in the summer of 2021.
- A scoring rubric was devised based largely on the list of functions in the RFI and organized into nine categories.
- Task Force staff used the returned RFI and training materials collected to give preliminary scores for each product.
- Virtual demonstrations were scheduled in the fall of 2021 open to all library staff.
  - *Each company was given four days to go over its products. In each case, the same itinerary was used featuring the same session topics and time slots.*
  - *The day after the main sessions, each company was available on a Zoom call to answer follow-up questions from staff on any aspect of the product. Questions for the ILS companies were collected by MCFLS staff and from an online staff survey made available after each demo session.*
- Trials were set up for the ILS products along with two additional products: Sirsi-Dynix's BLUEcloud Analytics (*used for reporting*) and Innovative's Mobile Worklists app (*used for inventory projects and paging lists in the stacks*).
- Post-demo meetings were held. This included conference calls with the staff from the OWLSnet Library System which has the CARL-X system, and the Chicago Public Library, which has Polaris. It was during this phase that the Task Force voted to eliminate CARL-X and Polaris and focus on Symphony/BLUEcloud from Sirsi-Dynix and Sierra from Innovative Interfaces. This decision was shared in an [update to the MCFLS Board and LDAC in February 2022](#).

To look more closely at the two remaining candidates, the group did the following:

### For Symphony/BLUEcloud (Sirsi-Dynix)

The group went on-site to visit the Oshkosh and Neenah Public Libraries to learn how staff there (including the Winnefox Library System staff) use the Symphony/BLUEcloud system. Because the Winnefox libraries hadn't implemented certain products or functions, the task force also set up a conference call with the IT Manager of the Lakeshores Library System to bounce questions off of that site along with a technical services librarian from the Kenosha Public Library who is part of that same system. MCFLS staff review the quote from Sirsi-Dynix which came with the RFI.

### For Sierra (Innovative)

A list of targeted questions was sent to three long-standing public library consortia asking about their experiences with Innovative Interfaces and with Sierra in particular. Those library systems were IFLS (Wisconsin), The Minuteman Library Network (Massachusetts) and Prairiecat (Illinois). In addition, MCFLS staff approached Innovative in April 2022 for an updated quote. The company came back with a revised proposal that included all of the options MCFLS requested including unlimited SIP2 licenses and cloud hosting for two new Sierra servers and a test, training server (see below). This secondary proposal meant Innovative's quote was more on par with that of Sirsi-Dynix.

In this last phase of the evaluation process, the Task Force discussed the two company proposals and scored the two products. A summary of these two items are listed below.

### Cost Proposals

	Sirsi-Dynix	Innovative Interfaces
<b>One Time Implementation</b>  <i>Covered by MCFLS</i>	<b>\$47,251</b> <ul style="list-style-type: none"> <li>• Migration to the new ILS</li> <li>• Migration of the MCFLS iTiva phone system</li> <li>• Consulting, training and project management</li> </ul>	<b>\$35,000</b> <ul style="list-style-type: none"> <li>• Hardware migration for Sierra and Encore (public catalog) with cloud hosting</li> <li>• Test Sierra system build and cloud hosting</li> <li>• 20 hours of workflow consulting or staff training (one-time)</li> <li>• Re-indexing of the CountyCat database</li> <li>• A new product, the Mobile Worklists app</li> </ul>
<b>Annual Subscription</b>  <i>Both quotes include</i> <ul style="list-style-type: none"> <li>• Core library software</li> <li>• Unlimited SIP2 licenses</li> <li>• Cloud-hosting of the ILS and test system</li> <li>• Syndetics Unbound for catalog enhancements/book jacket images</li> </ul>	<b>\$174,339</b> <ul style="list-style-type: none"> <li>• Electronic Resource Management product (includes eRM connector for OverDrive)</li> <li>• Test system</li> <li>• 20 hours consulting annually</li> <li>• Unlimited training for 50 users</li> </ul>	<b>\$197,963</b> <ul style="list-style-type: none"> <li>• Test system</li> <li>• Inclusion/activation of the additional Sierra products: <ul style="list-style-type: none"> <li>○ Scheduler</li> <li>○ Volume level holds</li> <li>○ Automatic authority control</li> </ul> </li> </ul>
<b>Maintenance increase</b>  <i>Multi-year agreements provide a lower annual increase rate with both company</i>	<b>After first three-year term</b>  3% Inflationary increase rate after first three years capped at 3.9%	<b>After first five-year term</b>  3% Inflationary increase rate after first five years capped at 5.0%

NOTE: Both companies provided several optional products for additional costs which are not listed here.

### Scoring Results

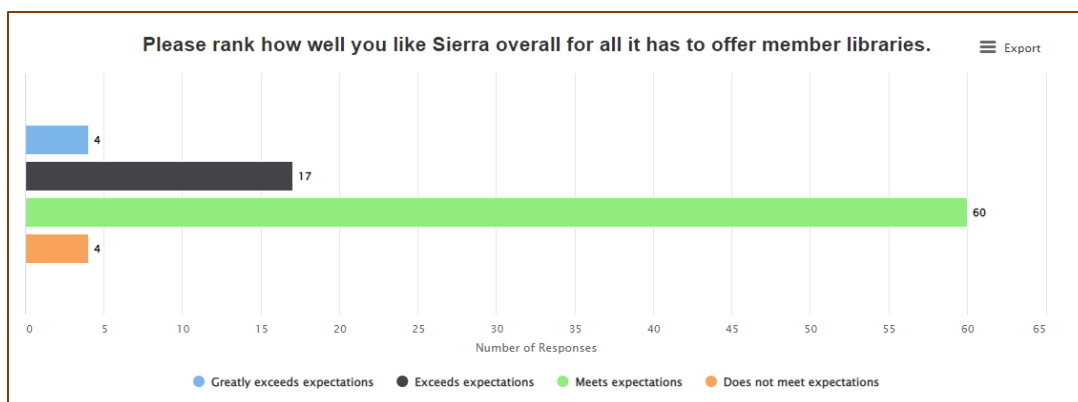
	Weighted Categories	AVERAGE Sierra	Weighted Average %	Weighted Pts	AVERAGE Symphony/BLUEcloud	Weighted Average %	Weighted Pts
Acquisitions (SH, JS, KP)	15%	54.3	8.1	69.3	55.7	8.4	70.7
Cataloging, Authority Control, Records Mgmt (KB, MM, JS, KD, SH)	15%	92.8	13.9	107.8	95.2	14.3	110.2
Circulation, Self-Check, Patron Records Mgmt (TH, JS, HAM, AH, SH)	15%	141.6	21.2	156.6	143.6	21.5	158.6
Reports & Statistics (SM, TH, SH, JS)	10%	50.5	5.05	60.5	57.5	5.75	67.5
Serials (JS, KP, KD, TH)	10%	56.5	5.65	66.5	52.8	5.28	62.8
E-Resource Mgmt (SH, JS, KP)	5%	3.0	0.2	8.0	10.7	0.5	15.7
Systems Administration & Authentication (JS, SH)	5%	54.0	2.7	59.0	61.5	3.1	66.5
Integration with Other Companies (JS, SH)	10%	48.0	4.8	58.0	46.0	4.6	56.0
Costs (ALL)	15%	30.1	4.5	45.1	18.8	2.8	33.8
Software & Implementation Costs							
Staff-Related Implementation & Training Costs							
	100%						
Weighted Average			66.2	630.8		66.2	641.8
Weighted Median			66.0	624.0		65.1	629.0

## Our Findings

The group found that both Sierra and Symphony/BLUEcloud are viable, complex products for library consortia and would be workable for MCFLS. Both have strengths and weaknesses which are summarized in [Appendix A](#). Both companies have a strong user group community worldwide with an enhancement process for its products. Both products offer the most extensive functionality *only* through use of its client or desktop application as opposed to its web-based software. With regards to the desktop applications, both companies have older legacy modules or products that are overdue for development while still being heavily relied on by libraries. Both desktop applications are built on the Java programming language so there is no difference for system staff in that regard.

A weighted scoring method was used in order to prioritize certain categories over others. The task force made its final decision on the ILS product based on the weighted average scores listed above. As the task force discussed the inherent organization of Sirsi's software, the group began to deliberate on how a move to this ILS would require new workflows and procedures along with the need to set up all equipment and configure notices, labels and slips coming out of the system. Record clean up and training would need to be done both before and after a migration. Such facts are reasonable and to be expected if migrating to another ILS product. However, cost became more of a factor. The sentiment was that an ILS change would not be a good return on investment for MCFLS. To invest staff time in this change, any product would need to be significantly better than the current ILS. No one on the task force felt that a move to Symphony/BLUEcloud would constitute a vast improvement over what libraries currently have with Sierra for all areas. While Lakeshores Library System has been very successful in customizing Sirsi-Dynix to meet its libraries' complex needs, our group couldn't ignore that their in-house expertise played a key role in that outcome. If MCFLS were to see a tremendous improvement with Sirsi's product, it would not be without a good amount of time maneuvering the software either in-house or through a paid contractor to meet all local needs. Current MCFLS staff capacity couldn't accommodate that work on top of what it does now for regular and on-going ILS maintenance and troubleshooting. Additionally, asking member libraries to embrace and prepare for a systemwide change may be ill-timed and unrealistic given the major disruption to staffing and services caused by the COVID-19 pandemic.

Sierra is not without its shortcomings, but no ILS is, and the task force feels it continues to serve our members well. Reviewing the 84 staff responses to a survey on Sierra (June 2021), the task force noted that 96% felt meets or exceeds staff expectations for all major areas. The general response from the task force is that Sierra meets our libraries' collective needs at this time.



What bolstered our final decision was the fact that Innovative dropped its initial quote 46% from \$368,000 to \$197,963. Innovative bundled many more products for our system in its proposal, and attempted to bring costs down. This offer is long overdue but does demonstrate that the company does not want to lose our business. MCFLS staff feel it is possible the company is more able and willing to negotiate pricing in recent years due to its acquisition away from a private equity firm, first by Ex Libris, a subsidiary of ProQuest in 2020, and then in 2021 by Clarivate, a publicly-traded company whose products are tied to research institutions. The sentiment from Marshall Breeding is that Innovative may be better positioned to become a formidable competitor in the public library market because of Clarivate's business and product strategies.<sup>1</sup> Clarivate has a few subsidiaries that are ILS products including Innovative's Sierra and Polaris product. Breeding feels this could mean greater communal access to product development and support in general.

<sup>1</sup> Breeding, Marshall. *Clarivate to Acquire ProQuest*. Smart Libraries Newsletter (July 2021). accessed online at <https://librarytechnology.org/document/26445>.

When reaching out to other Sierra libraries, a few reported that Innovative's customer service has been more responsive in recent years. Again, this may have to do with the change in ownership of the company. MCFLS can attest that Innovative has begun a new practice with all customers over the last year, where it holds a standing monthly conference call where its staff go over outstanding help desk tickets as well as any local concerns. In addition, the company has started offering more webinars and online discussions with the Innovative Users Group (or IUG) comprised of actual library customers. These are open to anyone and scheduled on an on-going rather than only during the annual IUG conference. Training materials have been [centralized to one Innovative web site](#) and no longer require a password. One librarian from the Minuteman Library Network who just completed a four-year tenure on the Innovative development process known as the Idea Lab, said he feels there's been substantial improvements to Sierra and Polaris products in the last 18 months. He said this is due to Innovative supplying a dedicated employee to product development and expanding communication. The task force feels all of these are steps in the right direction from the company.

## Recommendation for ILS & the Public Catalog

The ILS Review Task Force recommends that MCFLS stay with Sierra from Innovative Interfaces as our next system software, accepting the company's proposed contract which would cover July 1, 2022-June 30, 2027. The process for reviewing Sierra should occur again in four years with the committee comprised of both system and member staff.

One exception to this recommendation ties back to the public catalog. MCFLS currently makes use of Innovative's Encore product for CountyCat, the tool all patrons use to locate and place holds on library materials system-wide. The office manages an on-site server for Encore now three years old. While Innovative has confirmed support for Encore will continue for the foreseeable future, that product has not received any new developments for several years. It is not web accessible or mobile-friendly. During the ILS Review, Innovative presented on Vega, its replacement product to Encore. Despite reviewing Vega, the task force feels more time needs to be dedicated to identifying the best product for our libraries. Part of the rationale is that a few different third-party products could be set up with our backend Sierra software. Along with Vega, other options include Pika (*from the Marmot Library Network*), Aspen (*from ByWater Solutions*) and Bibliocommons (*from Bibliocommons*). Each of these products are currently implemented in at least one Wisconsin Public Library System also on Sierra (Northern Waters, Wisconsin Valley Library Service and IFLS respectively).

In requesting a revised quote from Innovative, MCFLS asked for an option that did not include Vega or Encore. Our recommendation is that Encore remain a MCFLS-paid annual expense (\$37,202) with Innovative providing a separate invoice for it. The evaluation for an Encore replacement should resume in late 2022 with the group making a decision by Q2 of 2023 and working to get the next product in place by June 2024. This would allow for a smooth transition off Encore that coincides with its renewal period.

In accepting Innovative's proposal, the task force identified what it sees as important post ILS Review activities.

### For 2022

- Schedule ten hours of Innovative workflow consulting that is tied to Acquisitions and Serials. The goal will be to evaluate current parameters and look for ways to improve staff efficiency with Sierra.
- Work with Innovative to activate Sierra Scheduler, Automatic Authority Control and Volume Level Holds
- Set up the new Mobile Worklists app for all members and train on title priority paging.
- Set up a policy to provide each libraries' Circulation staff a set number of logins to Sierra Web.
- Investigate a public catalog product to replace Encore using initial research from this project
- Implement the Syndetics/Unbound subscription with Encore and discontinue the Novelist Select product (*a \$28,500 cost savings to MCFLS*).

### For 2023

- Schedule ten hours of Innovative workflow consulting tied to Cataloging and Circulation. The goal will be to evaluate current parameters and look for ways to improve staff efficiency with Sierra.
- Work with Innovative to migrate new Sierra servers and a test training system on ProQuest's hosted environment.
- Decide on a replacement product for the Encore public catalog
- Use the test server to identify improvements for the production Sierra server and to do preliminary software upgrades.

## Beyond the ILS Review Process

This project opened our eyes to the extent our libraries are not thinking about any type of workflow changes that might lead to improved efficiencies. This became clear after the ILS demonstrations and from the responses of other Sierra libraries. MCFLS would benefit from reviewing how and why a few modules were set up the way there were. Innovative needs to be approached more often and asked to lay out all options available for several functional areas. Doing this would help MCFLS make better use of the software over the long term.

It is important that the work begun by the task force continues. Therefore, the group's final recommendation is that LDAC approve the creation of a new ILS Functionality subcommittee made up of staff from different libraries and who serve on other LDAC subcommittees. Participants of this subcommittee would be initially asked to meet frequently, likely every other month, to give feedback on new products or parameters Innovative activates for the system. After that, the subcommittee would meet three times a year where it pursues such activities as:

1. Providing a forum for the discussion of existing ILS issues & needs tied to Sierra;
2. Participating alongside system staff in both national and local trainings and IUG meetings;
3. Reviewing the Innovative roadmap each year to stay on top of its software updates and product development;
4. Submitting and voting on ideas for the Innovative Idea Lab enhancement program;
5. Managing a list of existing & new parameters that either single libraries or MCFLS as a whole consider adopting;
6. Work with MCFLS to identify training opportunities for staff.

The MCFLS office thanks all member libraries and the task force participants for its contributions to this project.



## Appendix A

### Positives for Symphony/BLUEcloud

- *Systems administration:* This part of the software is user-friendly and an improvement from the character-based screens offered with Sierra. Administrators can control if another library's records are viewable or not in the areas of serials and acquisitions. In addition, this product offers a history or audit of tasks performed by staff which is something MCFLS does not currently have.
- *Reporting:* Sirsi-Dynix offers multiple reporting products with its ILS, and the company has made great efforts with development in this area. One of the options includes SQL access which MCFLS staff currently use now with Sierra to create custom reports for libraries. The BLUEcloud Analytics product stands out as being impressive. It features a web dashboard where MCFLS could construct lists of reports available to be run as needed by member libraries.
  - The BLUEcloud Analytics and BLUEcloud Circ are both web-based. These products have a clean, intuitive interfaces that look easy to learn and train others on.
- *ERM:* The Electronic Resource Management product is better than the one from Innovative because it provides a method for integrating OverDrive titles into the public catalog without the need for batch MARC record loads. This is currently a manual task MCFLS staff perform with Sierra.
- Several libraries report that Sirs-Dynix is a very responsive company with great customer service.
- The company offers fair pricing and has more training options included with its annual subscription than Innovative.

### Negatives for Symphony/BLUEcloud

- *General functionality:* During the demonstrations, the focus was on the company's web-based products (Symphony Web and BLUEcloud). The representatives didn't allude to the fact that technical services staff would realistically need to rely on the desktop client application (Workflows) to access the most functions. In talking with the Wisconsin Sirsi-Dynix libraries listed above, it became clear that Workflows was the version staff used almost exclusively and that it would be some time before the functionality found there would be available in the web equivalents of the product. Circulation staff and staff working with reports, however, can rely on the Symphony web products without running into limitations. More transparency about this from the company would have been better, and given a more accurate picture of how libraries truly use the system.
- *General functionality:* Task force members found the interface of the desktop software (where the most functions live) to be cumbersome and inefficient as compared to Sierra. The software allows for the creation of a custom toolbar of specified tasks, and multiple tabs can be pinned to stay in place on the screen (with the number of tabs set to a limited amount), but the task force still felt information wasn't consolidated well on the window displays. There was a feeling of a lot of clicking to navigate and perform tasks. It seems as though a separate tab needs to open to complete most tasks.
- *Acquisitions:* Sirsi-Dynix's ILS does not offer an equivalent to the Innovative Quick Click product MCFLS members use to quickly bring over order records into Sierra from Baker & Taylor or Midwest Tape's web sites. That eliminates the need for staff to upload batches of MARC records and manually create order records. The Lakeshores Library System showed an automated acquisitions workflow where batches of records are scheduled to go in and out of the system while communicating to vendors about order status. That method looked like something MCFLS could replicate. However, the Quick Click product integration has become commonplace within MCFLS and makes for an efficient workflow. Coupled with this, is the fact that Sirsi-Dynix doesn't use order records but rather items with an on order status. A move to this ILS would translate into a completely new ordering and receiving workflow that impacts all members but especially MPL given the considerable amount of materials purchasing it does annually.
- *Cataloging:* This area of the ILS was interpreted as being on par with Sierra. A negative is that the Sirsi system does not offer the same extent of authority control/heading reports available from Sierra. Our libraries do not outsource authority control work. It also does not offer some type of equivalent to the local bibliographic fields currently offered in Sierra which allows suburban libraries to communicate with the Cataloging department of our resource library, the Milwaukee Public Library (MPL). The fields/codes in current bibliographic records (known as Cat Flags) provide MCFLS  
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with a method for managing centralized cataloging in a smooth fashion. At any point, staff know what stage of processing a title is in and when it will receive full cataloging. The bottom line is that a new workflow for shared cataloging and records management would need to be developed for MCFLS. Further, all technical services library staff would need training in MARC fields since those are prominently displayed and relied upon in the Sirsi-Dynix ILS.

- *Serials:* Sirsi-Dynix has a nice feature where it offers centralized publication patterns. This lets libraries copy and share set up patterns as needed. Other than this, the task force was underwhelmed by this area of the ILS. In speaking with the vendors, including Sirsi-Dynix, they made it clear that subscription patterns do not migrate from one ILS to another. This has negative implications for our member libraries. It translates into a large amount of work for all members but especially MPL which has an extensive periodicals collection with complex holdings. The subscription patterns would all need to be recreated manually.

### Positives on Sierra

- See the Our Findings section above.
- *API:* With each upgrade, new API end-points are being added to the software which allow libraries to perform more tasks with outside companies who have access to Sierra by specific area. (*e.g., one endpoint will pull out a patron's reading history from Sierra so that a third-party mobile app can display the information after the person logs in*).
- *Authority Control:* Sierra offers a number of headings reports for managing authority records that are not available from the other ILS products.
- *Serials:* Out of the four ILS products considered, Sierra had the most robust module for managing periodicals.
- *Reports:* Although Sierra Statistics and Web Management Reports are fair, member libraries also have access to Create Lists and custom SQL reporting. Having the combination of these products, the group feels Sierra meets local needs for reports and statistics. Ideally, Innovative would explore consolidating Sierra Statistics and Web Management Reports with its web-based Decision Center product, developing that much more and then bundling the within its core package.
- *The Mobile Worklists app:* This is an award-winning app that lets staff take Sierra to the stacks. You can use it to create a list by scanning barcodes, fill title-level holds and perform inventory tasks. Hopefully, item-level holds functionality is forthcoming but it is missing right now.

### Negatives on Sierra

- *Circulation:* Sierra lacks a good, canned report or method for identifying items that have been in transit between libraries for too long where staff cannot locate them in the system. MCFLS has a custom SQL report set up to work around this but it is an issue other libraries complain about.
- *Electronic Resources Management:* Although Sierra has a module for this area, the product doesn't allow libraries to manage digital collections in terms of integrating and tracking holdings outside of the ILS with another company's product or service. Libraries can create records representing their online subscriptions and licenses but staff still need to manually load records into the system if they want to display the titles in the public catalog and provide access to them.
- *Older, Outdated Products:* Innovative has a number of legacy products not really being developed which is frustrating. Examples include the Electronic Resources Management (ERM) and Web Access Management (WAM) modules. The company is dedicating considerable effort to Vega's development the last two+ years. MCFLS hopes the Idea Lab will lead to tangible improvements on its existing functional areas like Acquisitions and Circulation.
- *Systems Administration:* This area of Sierra consists of bulky tables that are especially hard for library consortia to manage on behalf of multiple libraries. There are no drop-down menus where an individual library's parameters can be reviewed and set. On top of this, the areas for managing load profile tables and system parameters rely on a hard-to-use telnet application that features character-based menus. The load profile management table recently won an Idea Lab challenge among customers which means a new development will go into a future Sierra release.



Library	2021 Resident Circulation	Percent of total circ.	2022 III Basic software	2023 III Basic Software	2022 III Add-On software	% of 2022 Add On Software	2023 Add- On Software	2022 Total III Costs	2023 Total III Costs	% Change
Brown Deer	50,654	1.3%	\$3,881	\$3,268	\$1,915	3.83%	\$1,594	\$5,796	\$4,863	-16.1%
Cudahy	112,802	2.9%	\$6,365	\$5,359	\$1,834	3.67%	\$1,527	\$8,199	\$6,886	-16.0%
Franklin	276,504	7.0%	\$12,906	\$10,868	\$1,114	2.23%	\$927	\$14,020	\$11,795	-15.9%
Greendale	141,036	3.6%	\$7,493	\$6,310	\$2,395	4.80%	\$1,994	\$9,888	\$8,303	-16.0%
Greenfield	164,948	4.2%	\$8,448	\$7,114	\$4,869	9.75%	\$4,053	\$13,317	\$11,167	-16.1%
Hales Crns.	54,486	1.4%	\$4,034	\$3,397	\$727	1.46%	\$605	\$4,761	\$4,002	-15.9%
Milwaukee	1,509,131	38.2%	\$62,159	\$52,344	\$20,295	40.64%	\$16,895	\$82,454	\$69,239	-16.0%
North Shore	208,467	5.3%	\$10,187	\$8,578	\$1,042	2.09%	\$867	\$11,229	\$9,446	-15.9%
Oak Creek	174,886	4.4%	\$8,845	\$7,449	\$2,880	5.77%	\$2,398	\$11,725	\$9,846	-16.0%
St. Francis	181,128	4.6%	\$9,095	\$7,659	\$708	1.42%	\$589	\$9,803	\$8,248	-15.9%
Shorewood	110,732	2.8%	\$6,282	\$5,290	\$1,805	3.61%	\$1,503	\$8,087	\$6,792	-16.0%
South Milwaukee	68,050	1.7%	\$4,576	\$3,854	\$1,044	2.09%	\$869	\$5,620	\$4,723	-16.0%
Wauwatosa	479,573	12.1%	\$21,020	\$17,701	\$4,075	8.16%	\$3,392	\$25,095	\$21,093	-15.9%
West Allis	231,145	5.9%	\$11,093	\$9,342	\$4,200	8.41%	\$3,496	\$15,293	\$12,838	-16.1%
Whitefish Bay	187,097	4.7%	\$9,333	\$7,859	\$1,035	2.07%	\$862	\$10,368	\$8,721	-15.9%
Total	3,950,639	100.00%	\$185,717	\$156,391	\$49,938	100.00%	\$41,572	\$235,655	\$ 197,963	-16.0%
% of Total				79%			21%		100%	

- Innovative is moving away from itemized software lines and is instead offering "bundles" or packages of software. As a result, Basic and Add-on categories can be merged into a simpler ILS maintenance category moving forward.
- MCFLS is proposing to use the 2022 Basic Software and Add-On Software percentages to fairly distribute costs and allow all members to receive the benefits of the newly negotiated pricing. The 2022 Basic Software costs are 79% of the total and 2022 Add-on Software is 21% of the total.
- Resident circulation would still be used to determine costs per the ILS agreement. The amount divided between libraries would be 79% of the maintenance total. The remaining 21% would be distributed using percentages shown in column H. Column H reflects distribution of total Add-on Software costs for 2022.

## InfoPass Implementation and Timeline

### June 2022

- Libraries will be sent an email with a link to fill out a form and submit information to be an InfoPass participant. As part of the process, libraries will be asked to sign a brief agreement and submit it to MCFLS (an example of the form is attached).
- Once the form is signed and submitted, libraries will receive an onboarding packet that contains the guidelines, workflows and examples to help staff use the InfoPass program.

### July 2022

- MCFLS staff will collect information from participants and finalize the request process. The new form uses information submitted by libraries to populate form fields and make the process easier for staff and patrons.

### August 2022

- Participating libraries will have until August 1<sup>st</sup> to submit their library information and participation agreements.
- The new InfoPass form and process will go live on Monday, August 15<sup>th</sup>.

# InfoPass Participant Agreement

*Approved by InfoPass Steering Committee, 1/14/2022*

## What is InfoPass?

InfoPass is a resource sharing collaborative of over 50 libraries (public, academic, private, special, K-12) designed to broaden access to patrons in the greater Milwaukee area by providing the guidelines and infrastructure to allow patrons from one library to borrow materials from other participating libraries. For a full description of the program operations, see the [InfoPass Operating Guidelines](#).

InfoPass was established in 1973 by the Library Council of Southeastern Wisconsin. Following the disbanding of the Library Council, WiLS took over InfoPass project management in 2013. In 2022, Milwaukee County Federated Library System assumed management of the InfoPass and now serves as the official project manager.

## Participation requirements

To participate in InfoPass, the institution agrees to the following terms and conditions:

- Agree to be an InfoPass lender in order to refer patrons to another InfoPass library for borrowing privileges.
- Adhere to the InfoPass policies as outlined in the InfoPass Operating Guidelines.
- Inform Milwaukee County Federated Library System (MCFLS) of any changes to contact information for the organization.
- Review and sign this agreement.
- Notify MCFLS of intent to withdraw from the program with 30 days written notice.

Agreed to and accepted by:

**MCFLS**

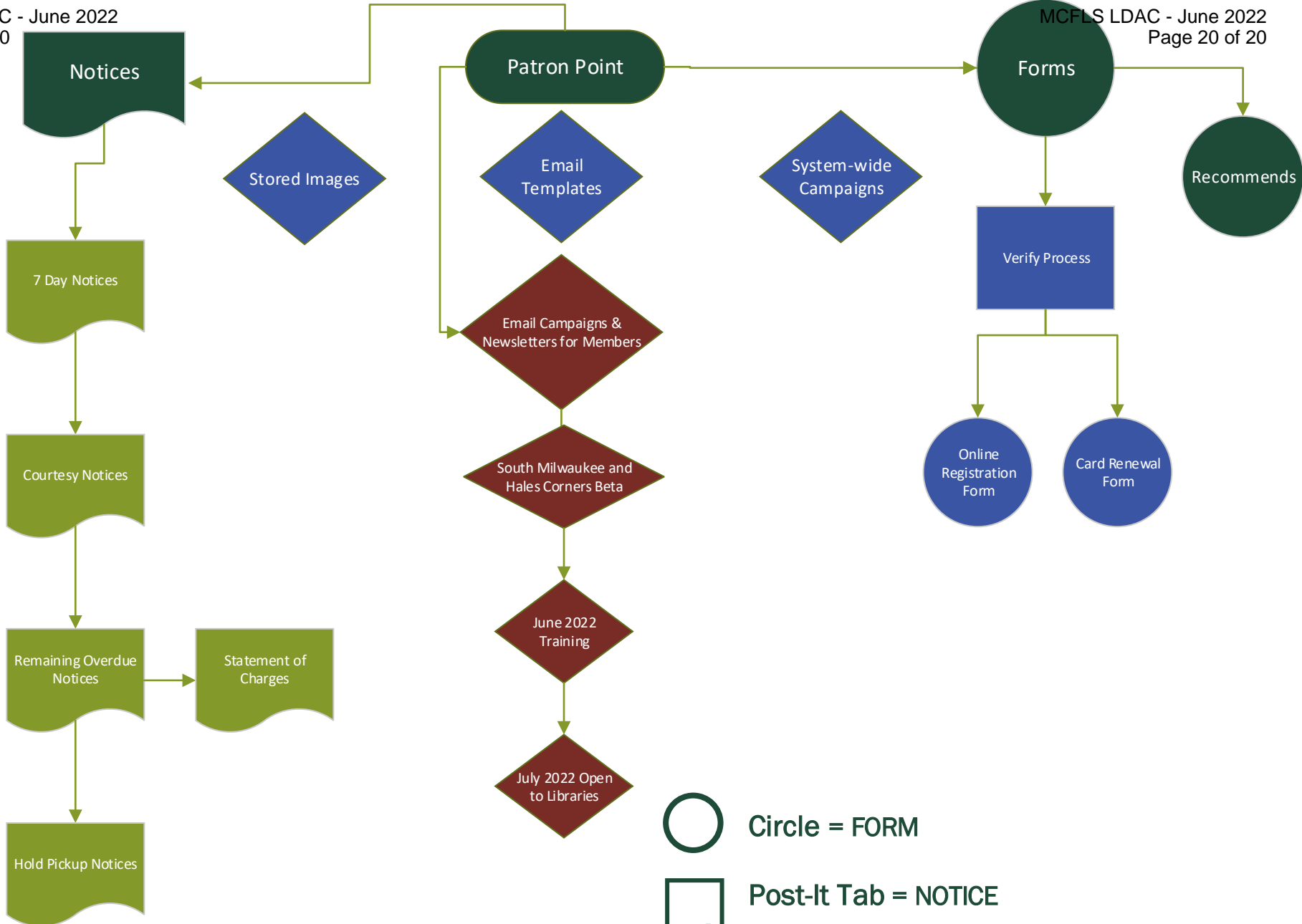
**{Partner Name}**

\_\_\_\_\_  
*Signature*

\_\_\_\_\_  
*Signature*

\_\_\_\_\_  
*Date*

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*Date*



Circle = FORM



Post-It Tab = NOTICE



Diamond = FOR MEMBER USE

Blue = MCFLS-made & shared content

Dark Green = PatronPoint Product by Name