Merlin Consortium Strategic Plan 2020-2023

Merlin is a consortium of libraries sharing an integrated library system (ILS) to process, circulate and display library resources for the public in an expanded interactive union catalog. Features of the Merlin catalog include requesting and renewing items from member libraries to be picked up at a chosen library. Searches can be limited by location, age level, or item type.

Libraries in an ILS share a telecommunications network, a hardware platform and library application software. Merlin was established for the purpose of facilitating resource sharing and increasing the efficiency and effectiveness of library services in northern Wisconsin. Merlin is a service program of Northern Waters Library Service (NWLS) for libraries in Ashland, Bayfield, Burnett, Douglas, Iron, Sayner, Vilas and Washburn Counties.

Combined, the membership currently boasts 1.39 million circs, over 188,000 items loaned, nearly 197,000 items received, and approximately 83,000 registered borrowers. The current catalog contains approximately 424,000 titles and 812,000 holdings.

There are many advantages of a shared ILS, including:

- provides a means to achieve statewide resource sharing requirements
- provides access to a wider scope of quality materials
- enables quicker access to materials
- helps to reduce overall costs and work load for members
- provides a means to leverage available resources and shared costs across participating libraries
- helps to strengthen communication and cohesiveness among members
- provides high quality centralized services
- establishes a shared database managed centrally for quality control

Purpose

The Merlin Consortium was established in 1999 (named after a hawk indigenous to Wisconsin.) Merlin's purpose is to provide a shared, integrated library automation system to NWLS member libraries. Other area libraries may participate for the purposes of:
- Facilitating resource sharing among network participants
- Increasing the efficiency and effectiveness of participant library operations and services, including managing database software, maintain the system hardware and software, managing of the online public access catalog, and evaluating merlin services, and
- Providing functions to participating libraries including, but not limited to, circulation control, online public access catalog, MARC cataloging and acquisition.

Mission

To provide access to an integrated library system of library resources and services to its member libraries, strengthening the libraries' ability to serve their library communities.

Vision

To partner with member libraries, ensuring seamless access to an evolving network of resources and services. The member libraries will work together to accomplish individual and shared goals.

Values

The Merlin Consortium holds these values:

- All people deserve free and equal access to library resources and services
- Our member libraries achieve more by working together
- Trustworthy and reliable library resources and services are essential to the future of communities
- Effective and efficient use of resources is a top priority; getting value for our libraries' investments
- Supports and defends intellectual freedom

Strategic Directions

Partnership
Build formal and informal partnerships to maximize the wide variety of library services we offer.

Relevance
Seek out ways to stay relevant in patrons' lives by staying abreast of current trends and services

Patron Services
Focus priorities on the end user and be responsive to patron needs as they change.

Positioning for future
Take steps to ensure viability and growth of consortium.

Objectives

Partnership

Goal: Our consortium will build formal and informal partnerships to maximize the wide variety of library services we offer.

Objective 1: The consortium will investigate merging ILS services with other systems.

Activity 1.1: Identify existing cost-sharing opportunities.

Activity 1.2: Document resources that Merlin has to offer in a partnership and how systems are already working together.

Activity 1.3: Approach the executive committees and tech staff at other consortia informing them of Merlin's documented interest in the idea of a merged ILS.

Activity 1.4: Address potential issues of a merged ILS by identifying fears and pitfalls, describing how problems and conflicts could be addressed in a reasonable way.

Objective 2: Investigate other potential shared services and standards.

Activity 2.1: Reach out to other systems for bulk supply purchasing opportunities.

Activity 2.2: Sharing/collaborative development of local cataloging vocabulary (especially around local/inclusive headings)

Activity 2.3: Develop bib standards committee to ensure local cataloging vocabulary are inclusive on a regular basis.

Activity 2.4: Reach out to other system bib standards committees to meet jointly.

Relevance

Goal: Our consortium will seek out ways to stay relevant in patrons' lives by staying abreast of current trends and services.

Objective 1: Positive, consistent marketing of services and support of libraries.

Activity 1.1: Develop consortium-specific marketing materials.

Activity 1.2: Develop talking points on relevancy and support of libraries.

Objective 2: Seek and promote programming, services and resources.

Activity 2.1: Develop strategies to promote resources on a consistent basis.

Objective 3: Develop stakeholder understanding of system (vs. single library) model and benefits.

Activity 3.1: Develop a list of stakeholders.

Activity 3.2: Create educational marketing materials to share with stakeholders

Patron Services

Goal: Merlin will focus priorities on the end user and be responsive to patron needs as they change.

Objective 1: Develop a plan and timeline for centralized cataloging.

Activity 1.2: Decide what options are available (system cataloger or partner with other consortia)

Activity 1.3: Develop a funding plan.

Objective 2: Investigate ways to improve online catalog.

Activity 2.1: Investigate discovery layer options available and costs.

Activity 2.2: Develop a funding plan.

Activity 2.3: Install discovery layer.

Objective 3: Promote backup plans for service outages.

Activity 3.1: Arrange for NWLS head end access to switch to the RDC.

Activity 3.2: Investigate local options for alternative internet access.

Objective 4: Promote WebSierra for outreach use.

Activity 4.1: Provide access to staff for WebSierra.

Activity 4.2: Provide continuing education on mobile outreach and examples.

Objective 5: Evaluate ILS options.

Activity 4.1: Investigate available options.

Activity 4.2: Discuss the advantages and disadvantages of options.

Positioning for future

Goal: Take steps to ensure viability and growth of consortium

Objective 1: Align with state level practices (directions).

Activity 1.1: Participate in PLSR related ILS and Discovery Layer activities

Activity 1.2: Consult with SRLAAW to keep abreast of the status of ILS and System mergers.

Objective 2: Funding for additional system staff.

Activity 2.1: Investigate grant opportunities.

Activity 2.2: Seek alternative sponsors.

Objective 3: Development and expansion of digital collections.

Activity 3.1: Investigate possible streaming and other digital resources.

Objective 4: Develop specialized consulting/training resources which can be shared through the state.

Activity 4.1: Highlight inclusive services.

Activity 4.2: Highlight accessibility services.

Objective 5: Add more libraries and patrons to the consortium.

Activity 5.1: Open consortium membership to school libraries in the area.

Activity 5.2: Encourage community libraries to become members.

Activity 5.3: Investigate possibility of more branch libraries.

Activity 5.4: Conduct patron drive activities.

Activity 5.5: Investigate and encourage tribal libraries.

Progress and action for the Merlin strategic plan will primarily be the responsibility of the Merlin staff at NWLS, who will seek additional support from Merlin members as needed. Progress reports will be provided regularly at Merlin meetings.