INFORMATION TECHNOLOGY STRATEGY

LEANWI

A Collaborative Partnership

January 2025 – December 2029

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EXECUTIVE SUMMARY

This strategy utilizes and further develops the framework for success established by LEANWI partners, outlining shared, categorical service goals. It is a reference for supporting the annual Library System Plans of respective partners, representing the Technology Plan for LEANWI partners and member libraries, anchoring LEANWI short-term and long-term operational technology planning, and is extensible, supporting additional locale-specific plans necessary to address each partner's unique needs. It is also a guide for Information Technology staff of partner systems and member libraries, presenting an overview of immediate and long-term goals.

The improvement of overall operational efficiency is the intended outcome for each goal. The LEANWI partnership aims to build upon and continue its partners' respective leadership in architecting, implementing, and improving upon its durable and sustainable service model, maximizing service effectiveness and minimizing the overall cost of resources. Partners will continue to leverage this across all other departments and member libraries, providing access to the resources necessary to achieve their own goals and working to help them identify and pursue efficiency-building opportunities. Standardization, centralization, and deduplication of equipment, management tools, and service containers is core to the enterprise services framework LEANWI partners have developed and continue to improve.

Other intended outcomes include: maintenance of the high quality blended network and technology services infrastructure partners have been refining and enhancing since 2015; regular reevaluations of the operational technology environment; regular evaluations of new technology concepts and service goal solutions to weigh their potential benefits against the cost of implementation and maintenance; development of new services and programs to help member libraries continue maintaining a high sense of relevancy and value to their public; and regular evaluations and efforts to improve communications.

Economic factors partially influenced the formation of the LEANWI partnership, but the primary driving factor was and remains the development of information technology resources and services which help member libraries maintain and improve the delivery of library services to their communities. Efficiency and effective leadership in technology services were cornerstones of the partnership's founding and remain at the heart of the LEANWI ideology. They are key to continued success in the expansion of high quality, sustainable technology services.

LEANWI Mission and Purpose

The Libraries and Enterprise Applications Nexus of Wisconsin (LEANWI) partners cooperate on the joint implementation and support of technology services, sharing resources between partner library systems to the greater benefit of each partner and member library.

Technology Leadership

Engineering and Operations Lead (EO Lead - Currently IFLS IT Director) – This role works with the LEANWI Technology Team to develop and implement acute and long-term operational plans which serve the needs of the partner systems and member libraries. This role works closely with the **Technology Services Lead** and the **Business Management Lead** to ensure long term strategies inform and are informed by operational planning and production services and that forecasting of resource needs is feasible and sustainable. This role leads operations for production infrastructure and integrations with technology application services and support services.

Business Management Lead (BM Lead - Currently WVLS CIO) – This role works with the LEANWI Technology Team to orchestrate the development of information technology strategy and helps the LEANWI partnership achieve efficiency as advocate and coordinator for the executives and administrators of partner systems and member libraries. This role observes and aggregates the sense of direction and related needs expressed by leadership in each partner system and works with the **Engineering and Operations Lead** and the **Technology Support Lead** to ensure the technology service framework adjusts to those needs as they change over time in a durable and sustainable manner. This role leads long term development of sustainability planning, business relationships, and business management operations supporting the technology services and underlying infrastructure managed by LEANWI partners.

Technology Services Lead (TS Lead – Currently NWLS IT Director) – This role works with the LEANWI Technology Team, coordinating the development and operation of application and technical support services for partner systems and member libraries. This role works with the **Engineering and Operations Lead** to identify, assess and integrate library facing and support team facing applications and tooling within the core infrastructure and services platform the to ensure technical support capabilities align with technology service provisioning. The TS Lead also works with **the Business Management Lead** to ensure all necessary resources are planned and accounted for fiscally, and that distribution of related resources is consistent and equitable among all partners.

Cooperative Management

Partner systems will continue coordinating and working to ensure primary leadership roles are not concentrated in a single partner system. The spirit of the LEANWI partnership is one of collaboration, cooperation, and joint effort. The distribution of executive leadership and management facets in the department of technology services is intended to create a stronger whole via deduplication of the entirety of efforts an individual technology manager would otherwise be responsible for in a standalone system. Distributing the roles among more than one partner acts to reinforce cooperation and collaboration, encourage more depth, and ensures durability of the partnership.

Technology Team

The LEANWI Technology Team is made up of technology support staff from partner systems. The first iteration of the LEANWI Technology Strategy focused primarily on the engineering core. As the core is the foundation for most services, it remains a priority. This iteration of the LEANWI Technology Strategy continues the previous iteration's expansion of that priority and its focus on the operation of backend and provisioning of frontend support to member libraries and library staff. Team members from any partner may lead one or more specific technology service areas.

The principles of collaboration, cooperation, and joint effort are fundamental to the partnership. This strategic plan uses the term Technology Team primarily to reference those specializing in technology engineering, support, and general management. It may also use the Technology Team term occasionally to reference all who serve within the LEANWI technology services stack in any capacity. The Technology Team thus may refer inclusively to those who manage and support technology infrastructure and core applications as well as those who administer and support the Integrated Library Systems (ILS), provide or coordinate training on technology subjects, and provide direct technology services, consultation, and support such as website development and digitization projects.

SECTION A – TECHNOLOGY STRATEGY: A VISION FOR TECHNOLOGY LEADERSHIP

In any organization the strategic planning, implementation, and management of information technology resources is a continually evolving process. Innovation leads to changes and divergence across usage models, sometimes altering an environment subtly, other times driving significant change before people are ready. Even the way we assess new services is fluid and dynamic, with social pressures, economic factors, and manners of maintaining relevancy continuously changing. Determining when to adopt new trends, and when to maintain an existing system of services is no simple task when feasibility *and* meaningfulness fluctuate over time.

Why LEANWI Technology?

LEANWI partners empower libraries to accomplish amazing things. Our vision is to ensure that all libraries have access to the technology they need to succeed, period. LEANWI is a demonstration of the success of cooperative convergence. Partners connect libraries physically and personally, working with members to cultivate a strong network of capital, information, and resource sharing.

How do we Achieve IT?

Trust;   Cooperation;   Equitably shared resources;   Mutual net benefit;   Selfless service.

What IT is.

Information technology services needed by libraries are like those of most organizations with multiple physical locations spanning large regions: Support for the creation, discovery, consumption, sharing, and preservation of various types of information. Desktop and web application access, information security tools, multiple shared Integrated Library Systems (ILS), supporting infrastructure, local technology strategy and planning consultation, and education are also important components. LEANWI envisions a technology service environment where library administrators, staff, and public users in any library can focus on the business of quality library programming and services without worry of technology capacity, constraints, or compatibility.

The LEANWI Technology Strategy establishes a cohesive long-range vision across these high-level categories:

- Common and Divergent Goals
- Evaluation and Assessment
- Net Benefit

- Objectives
- Resources
- Equitable Service

The LEANWI Technology Operations Framework provides structure and focus for evolving operational plans adopted to meet current and future objectives:

- Enterprise Service Architecture
  (Libraries Win Services)
- Viability and Continuity
  (Consistency for planning and budgeting)

- Infrastructure
  (Compute, Storage, Networking)
- Business Management
  (Consulting and Advocacy, B2B)

SECTION B - TECHNOLOGY STRATEGY: OPERATIONS FRAMEWORK

LEANWI partners work cohesively to unify technology resource management and sharing, offering all member libraries consistency in the available and supported information technology services necessary to empower efficiency and productivity, enabling efforts which positively impact their communities.

LEANWI Technology Objectives

These strategic objectives inform the Operational Technology Plan. The plan details the current position of the LEANWI Information Technology services, describing the processes and tools used to complete these objectives.

Enterprise Service Architecture – Libraries Win

The origin of the LEANWI partnership is connected to a large project undertaken by IFLS Library System, Northern Waters Library Service, and Wisconsin Valley Library Service to explore the value, feasibility, and overall desirability of the convergence of over one hundred public library locations across twenty-five counties in Wisconsin to a single ILS consortium and application. The effort, called Project WIN (for WVLS, IFLS, and NWLS) did not lead to an ILS merger, but the community of professionals sharing information and crafting micro-models of resource sharing scenarios enabled two of the systems to later focus on sharing core technology resources as a separate endeavor. The partnership they formed was dubbed LEANWI. In honor of the time, effort, and admirable professionalism which system and member library colleagues put into that project, LEANWI leadership appropriated the librarieswin.net and librarieswin.org domain names used to host the original Project WIN website and named the technology services layer "Libraries Win."

Principal Outcomes:

- Standards Based Core Services
- Unified Support Structure
- Identity Agnostic
- Prioritize Facilitation

- Durable
- Sustainable
- Simple / Elegant
- Minimize Constraint

Infrastructure – LEANWI

The core of LEANWI is the infrastructure that interconnects libraries with internet, Libraries Win services, ILS servers, and other services or service frameworks. Assets are jointly owned, and barriers to entry for future partners reduced with a present-forward cost sharing model prioritizing ongoing sustainability over the recovery of past expenditure. Recognizing that a particularly significant barrier to collaborative effort is "perception of fairness" conflicting with "consistency and equitable service" across a partnership, a core tenet of LEANWI is "value over fairness". It is more valuable, partner by partner, for each to contribute resources equally, irrespective of the various diversities across several metrics. Success (and incentive to continue participation) is measured by each partner getting more out of the partnership than it puts in. Continuity of partnership yields the greatest individually realized value and thus LEANWI partners focus on strengthening the infrastructure layer with minimal complexity in evaluating cost distribution formulas or usage levels.

Principal Outcomes:

- High Quality
- Bidirectionally Scalable
- Resource Efficient
- Enables Libraries Win Service Success

- Durable
- Sustainable
- Simple / Elegant
- Inclusive

Viability and Continuity

Without assurance of continuity, a resource holds little long-term value. Viability of partnership, vision and direction of strategy, production operations, and serviceability is critical to cross departmental and member library adoption of services and trust in the platform. The theme of simplicity, scalability, durability, and sustainability propagates through all layers from the business relationship maintaining the LEANWI partnership, through infrastructure and service framework, to individual services and service teams, non-partner platform consumers, internal staff users, member library users, and the vast array of micro-dependencies therein.

Principal Outcomes:

- Team Unity
- Broad Service Awareness
- Resource Availability Forecasting
- Inclusion of Additional Partners

- Professional Development
- Fiscal Prudence
- Documentation Management
- Communication

Business Management

As a strong infrastructure must be relevant to the service layer it supports, strong business management must be relevant to the operations it supports to successfully ensure the viability and continuity of partnership, platform, and services.

Principal Outcomes:

- Service Coordination
- Needs/Demands Aggregation
- Resource Planning
- Partnership Development

- Consultation
- Fiscal Prudence
- Vendor Management
- Succession Planning

SECTION C – OPERATIONAL TECHNOLOGY PLAN   (DYNAMIC)

Wisconsin Statute 43.24(2)(m) (https://docs.legis.wisconsin.gov/statutes/statutes/43/24/2/m) reads:

> *"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. By January 1, 2000, and by every 5th January 1 thereafter, the public library system shall submit to the division a written plan for library technology and the sharing of resources."*

LEANWI Technology Leadership recognizes and places appropriate priority on the value of presenting long term strategy to their respective Systems' Boards of Trustees as well as the State of Wisconsin and understands the fluid nature of relevant technology operations. LEANWI partners maintain an adaptive and evolving operational technology plan to facilitate service needs in a manner which supports the long-term technology strategy. These operational goals and objectives align with the long-range strategic objectives and principal outcomes.

Each Operational Objective under the following Goals currently has or will have one or more Operational Strategies abstracting the specific sets of production services serving or intended to satisfy them. In tandem with a comprehensive effort to update and catalog applicable operational documentation during 2025 and 2026, this plan will be updated to include the operational strategies in production and those definitively planned for production implementation during 2026 through 2029. Additionally, newly identified Goals and Operational Objectives will be documented along with their respective Operational Strategies.

Goal: Provide comprehensive and holistic technology consultation to library administrators, assisting in the development of locale-relevant technology plans and budgets in concert with other libraries.

Strategic Objectives:
  Enterprise Service Architecture, Infrastructure, Viability and Continuity, Business Management

Coordinator: Technology Services Lead

- **Operational Objective:** Provide libraries with technology expertise and consultation services.

  Strategy:

- **Operational Objective:** Communicate regularly with library technology staff to consult and advise on technology infrastructure and workflow practices.

  Strategy:

Coordinators: Business Management Lead; Technology Services Lead

- **Operational Objective:** Facilitate coordinated procurement of technology capital, third party services, and software licensing for libraries.

    Strategy:

- **Operational Objective:** Complete the development of and continue ongoing management and maintenance of the LEANWI erate consortium entity in the Erate Productivity Center (EPC) expressly to support mobile hotspot services for member libraries throughout the partnership. Provide additional erate and other federal, state, and local technology (funding) support consultation and services on case-by-case basis.

    Strategy:

Goal: Facilitate technology training for system and library staff.

Strategic Objectives:
Viability and Continuity, Business Management

Coordinator: Technology Services Lead

- **Objective:** Support LEANWI partners in meeting respective Library System Plan goals and objectives for technology training and training in other service areas.

    Strategy:

Goal: Provide a high quality, durable, and scalable technology infrastructure and enterprise service framework capable of meeting current and planned service requirements.

Strategic Objectives:
Enterprise Service Architecture, Infrastructure, Viability and Continuity, Business Management

Coordinators: Engineering and Operations Lead;

- **Objective:** Facilitate and maintain a secure and adequately provisioned network for data communication between libraries, the LEANWI partner headquarters, and the LEANWI Data Center.

    Strategy:

- **Objective:** Monitor the health of the network. Log and assess usage by libraries including bandwidth utilization, equipment capacities, and other metrics as deemed relevant or necessary over time.

Strategy:

Coordinator: Technology Services Lead

- **Objective:** Monitor the relevance and viability of library-facing application services and LEANWI team-facing applications and utilities. Log and assess usage by libraries including licensing utilization, service capacities, and other metrics as deemed relevant or necessary over time.

    Strategy:

- **Objective:** Implement, maintain, and manage high quality technical support for core and primary technology services utilized by libraries.

    Strategy:

Coordinators: Business Management Lead; Engineering and Operations Lead; Technology Services Lead;

- **Objective:** Procure, implement, host, maintain, and manage shared applications and databases for core and primary technology services used by libraries.

    Strategy:

SECTION D - MILESTONES AND PROGRESS EVALUATION (DYNAMIC)

These milestones are established to help evaluate the progress and success of implementation and operation of the LEANWI technology strategy.

A new plan for establishing and evaluating progress towards milestones will be developed by July 2025. The first progress evaluation will be complete by July 2026 and subsequent reports will be developed within the plan mentioned above. The progress evaluations will be published on the LEANWI website (https://leanwi.org).

March 31, 2025:

- Complete review of all published and solicited Wisconsin Public Library System Technology Planning documents and resources.

  Actions:
  - Curate published current or recent technology plans from all Wisconsin Library Systems
  - Solicit updated documentation including planning documentation, notes, meeting minutes, etc from all Wisconsin Library Systems willing and able to provide them
  - Establish a workgroup of library system staff and member library staff from LEANWI partner systems and interested collaborator systems to review plans and documentation for commonalities and to foster ideas for LEANWI technology service enhancements or additions
  - Task the workgroup with developing additional strategic objectives, primary outcomes, operational goals, operational objectives, and operational timeline milestones through 2026

June 30, 2025:

- Complete https://leanwi.org reference site for Appendix B

  Actions:
  - Work with website development team to add/update relevant resources

- Complete first Milestone development process including system and member library stakeholders

July 31, 2025:

- Complete draft 2026 LEANWI joint budget
- Begin 2026 - 2027 operational planning review

November 30, 2025:

- Complete Operational Strategy documentation and Operational Technology Plan updates for the 2025-2029 LEANWI Information Technology Strategy

2025 LEAN Wisconsin Budget Summary

Revision 1, Draft 1 (July 2024)

Lifecycle Reserve Balance - Jan 1, 2025	$338,853.83	**Total Operating Expenses**	$298,742.82
Disaster Recovery Balance - Jan 1, 2025	$43,719.00	Non-HR Operating Expenses	$229,173.82
Unexpended Funds Estimate - Jan 1, 2025	$52,000.00	Salaries/Wages	$ 43,420.00
		Benefits	$ 26,149.00
IFLS Partner Total	$ 82,089.27		
NWLS Partner Total	$ 66,012.27	**Total Reserves Balance**	$497,929.83
WVLS Partner Total	$102,416.27	Non-Operating Reserve	$ 99,000.00
Grant Support	$ 77,028.00	Reserve Funds	$398,929.83
Other Revenues	$ 23,054.00		
Prepaid Service Credit	$ 11,500.00	Carryover Action(s)	$ -
Total Funds	**$796,672.65**	**Total Appropriations**	**$796,672.65**

Funding Sources

Appropriation Classification	Joint	Partners			Associates
		IFLS	WVLS	NWLS	
Operating	$168,999.82	$48,643.00	$53,970.00	$27,130.00	
Non-Operating	$99,000.00	$0.00	$0.00	$0.00	
Lifecycle Reserves	$ 329,371.43	$ -	$69,558.40	$ -	
Totals	$ 597,371.25	$ 48,643.00	$123,528.40	$ 27,130.00	
Other Revenues					
Infrastructure Services	$ 11,500.00				
CPA Recovery			$ 2,000.00		
Cooperative Cataloging	$ -				
Grants	$ 77,028.00				
Website Svc Collaborators	$ 21,054.00				
Starting Balances	$ 335,790.43	$ 17,220.00	$ 69,778.40	$ 11,784.00	
Totals	$ 445,372.43	$ 17,220.00	$ 71,778.40	$ 11,784.00	
Expenditures	$ 597,371.25	$ 48,643.00	$123,528.40	$ 27,130.00	
Less Other Revenues	$ 445,372.43	$ 17,220.00	$ 71,778.40	$ 11,784.00	
Partner Shares	$ 50,666.27	$ 31,423.00	$ 51,750.00	$ 15,346.00	

Note: Target for D/R fund is $63,000 or approximately 20% of annual non-HR operating and average annual lifecycle renewal costs.

Note: Full accounting of the 2024 LSTA (FYE25) Sparsity Aid managed by DPI for the State of Wisconsin's FY24 period (July 1, 2024 - June 30, 2025) of $66,243.82 ($77,028 less $10,784.18 expended July 2024) is incorporated into the LEANWI 2025 Appropriations Plan with approximately $17,043 documented under 6-6210 Other as not yet designated to specific projects.

APPENDIX B – REFERENCES

This appendix references the collection of documentation across LEANWI partners which describe the entities, services, service models, and comprehensive plans the LEANWI technology strategy is intended to serve and support. This reference resource will be revisited in 2024/2025 by the LEANWI website services team and implemented for public access in 2025.

Online Documentation:

The most recent versions of all LEANWI partners' respective planning documents can be found at:
- LEANWI Technology Strategy Guide – http://leanwi.org/<guide resource>/
- System Plans – https://leanwi.org/<system plans reference>/
- ILS Plans – https://leanwi.org/<ILS plans reference>/
- Policies – https://leanwi.org/<Policies reference>/
- ?Other? – https://leanwi.org/<other resources and/or reference>/