

## Overarching Considerations

Exhibit 10b

Recommendations	Activity	Who?	Funding	Funding Estimate	Statute Issue?	Start Date	End Date	Notes
Hire PLSR Project Manager		DPI	LSTA	Dependent on Classification	No	Fall 2019	Winter 2020	
Implementation Summit	Establish communication channels, check process flow, solicit feedback and ideas, identify unanticipated consequences of implementation, identify data to be measured and tracked, etc.	Stakeholders	LSTA	\$15,000	No	Spring 2020	Spring 2020	LSTA 2019 Proposed Process  Do we need a website for implementation or does that information live on the PLD page?
Share results of Implementation Summit	Disseminate information on the process, timeline, and where to receive updates and provide feedback.	DPI	DPI Internal		No	Spring 2020	Spring 2020	

## High level of Support

Recommendations	Activity	Who?	Funding	Funding Estimate	Statute Issue?	Start Date	End Date	Notes
<b>Recommendation #7:</b> Implement a Learning	Finalize setup of Library Enterprise Directory	DPI	WISEdata	\$130,000	No	Ongoing	Fall 2019	This project will serve as the backbone for an improved director certification process.
	Make internal improvements	DPI	WISEdata	\$100,000	No	Fall 2019	December	Will result in an online, paperless Public



	RFP for additional platform(s)/software if necessary							
	Development phase of customizing the Learning Management System platform	DPI or Vendor	WISE		No	January 2021	Summer 2021	Establish pilot process. Either roll out elements of the platform slowly, or use 1 or 2 systems as pilot projects
	Train system staff and library staff on the use of the LMS	DPI or Vendor	WISELearn		No	Spring 2021	Summer 2021	Administrative rule or statute if statewide adoption of resulting product is an issue
	Determine how Consulting, support triage can be incorporated	Implementation Team	DPI Internal		No	Summer 2021	Winter 2021	DPI team: Shannon Schultz, Cindy Fesemyer, Tessa Schmidt
<b>Recommendation #4: Analyze the Current Funding Formula</b>	Draft issue paper on the topic of funding formula	DPI	DPI Internal		Yes <a href="#">43.24</a>	Fall 2019	Winter 2019	DPI Lead: John DeBacher  LD&L may have started activity - engage with this?
	Conduct formal analysis of funding formula effectiveness and implications of changes to formula	External Consultant	LSTA	\$50,000	Yes <a href="#">43.24</a>	Winter 2019	Summer 2020	LSTA 2019 Proposed Project
	Identify funding summit participants, plan, and schedule summit	COLAND & DPI	DPI Internal		Yes <a href="#">43.24</a>	Spring 2020	Summer 2020	
	Share findings of funding formula analysis and gather feedback from key constituent entities	DPI	DPI Internal		Yes <a href="#">43.24</a>	Spring 2020	Summer 2020	Key constituent entities: public library system directors, DPI leadership, WLA, COLAND
	Hold summit to create formal	Stakeholders	LSTA	\$10,000	Yes	Fall 2020	Fall 2020	

	recommendation(s)				<a href="#">43.24</a>			
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**Supported, but might require more work to move forward**

Recommendations	Activity	Who?	Funding	Funding Estimate	Statute Issue?	Start Date	End Date	Notes
<b>Recommendation #1:</b> Develop Standards, Best Practices and Accountability Structures for Public Library Systems	Establish Implementation Team to consider statutory system standards	DPI	DPI Internal		No	Spring 2020	Spring 2020	
	Establish Implementation Team to consider system best practices	DPI	DPI Internal		No	Spring 2020	Spring 2020	
	Create recommendations for statutory system standards	Implementation Team (Standards)	LSTA	\$5,000	Yes (admin rule) <a href="#">43.09(2)</a> <a href="#">43.15</a>	Summer 2020	Fall 2020	Shannon Schultz  Review SRLAAW report " <a href="#">Creating More Effective Library Systems</a> " and analyze current system services based on Appendix A: Wisconsin Public Library System Standards
	Define system best practices and how to share those best practices	Implementation Team (Best Practices)	LSTA	\$2,500	No	Fall 2020	Winter 2020	Shannon Schultz, Michael Dennison
	Conduct System Fiscal Practices study	External Consultant	LSTA	\$75,000	No	Winter 2019	September 2020	John DeBacher, Michael Dennison  LSTA 2019 Proposed Project
	Analyze and make recommendations on governance around standards	Implementation Team (Joint?)	LSTA	\$5,000	Yes <a href="#">43.09(2)</a>	Winter 2020	Spring 2021	Board of systems idea  Could be initiated by consensus-

	and best practices				<a href="#">43.15</a>			developed volunteer group, nominated by library community, DPI, ?
<b>Recommendation #2:</b> Enhance Collaboration by Creating Incentives and Removing Barriers	Monitor Statewide System Backup project and look for additional technology-related collaboration opportunities	DPI	DPI Internal		No	July 2019	Ongoing	
	Conduct research to assess issues, disincentives, barriers, and potential incentives	External Consultant	LSTA	\$25,000	Maybe <a href="#">43.17(6)</a>	July 2019	September 2020	Statute-related barriers would be identified here
	Establish Implementation Team	DPI	DPI Internal		No	Fall 2020	Fall 2020	
	Investigate and document current collaboration, develop a guide that outlines resources for future collaborative projects, potential funding options, and available experts for facilitators. Generate a plan to effect statutory changes, if needed	Implementation team	LSTA	\$2,500	Maybe <a href="#">43.17(6)</a>	Fall 2020	Summer 2021	DPI: Tessa Schmidt  Use PLSR workgroup reports as initial framework
<b>Recommendation #5:</b> Initiate Delivery Service Pilot Projects	Outside consultant to look at and fact check workgroup report and steering recommendation	External Consultant	LSTA	\$75,000	Maybe <a href="#">43.24(2)(f m)</a>	Fall 2019	September 2020	LSTA 2019 Proposed Project
	Appoint or hire a project manager charged with performing necessary research, coordinating stakeholder groups, and	DPI	LSTA	cost if Project Manager is hired		Fall 2019	Fall 2019	Can be part of overall project managers duties?

	managing implementation issues relating to this recommendation							
	Convene workgroup to help issue RFP, define outcomes and output collection and work through implementation	Project Manager	LSTA	\$5,000	Maybe <a href="#">43.24(2)(f m)</a>	July 2020	December 2020	
	Institute Delivery Pilot Projects based on defined outcomes of the delivery workgroup and outside consultant	DPI or Project Manager	LSTA	\$100,000	Maybe <a href="#">43.24(2)(f m)</a>	July 2021	December 2022	LSTA 2020
	Implement findings and recommendations of the pilot project in other parts of the state	Public Library Systems	LSTA	High cost	Maybe <a href="#">43.24(2)(f m)</a>	January 2021	Ongoing until full participation	LSTA grants could fund implementation as a semi-competitive category

**Need more education/research before moving forward**

Recommendations	Activity	Who?	Funding	Funding Estimate	Statute Issue?	Start Date	End Date	Notes
Recommendation # 6: Create an Effective, Well-Managed, State-Scale Discovery Layer	Write issue paper(s) on Discovery Layers and integrated ILL technologies	DPI	DPI Internal		No	Fall 2019	Spring 2020	Gail Murray, Ben Miller, Elizabeth Neuman
	Conduct environmental scan on Discovery Layer instances in Wisconsin, including cost and funding sources	DPI	DPI Internal		No	Fall 2019	Spring 2020	Gail Murray, Ben Miller, Elizabeth Neuman

	Write issue paper(s) around Discovery Layers and E-resources, including topic of centralized authentication	DPI	DPI Internal		No	Fall 2019	Spring 2020	Elizabeth Neuman  This is referenced in the Collections Workgroup report.
	Establish a statewide cataloging and policy workgroup to begin identifying standard practices that will lend themselves to greater interoperability	DPI	LSTA/W ISE	\$5,000	No	Fall 2020	Spring 2021	Referenced in the ILS/ILL/Discovery Workgroup recommendation.  Could begin by creating a statewide workflow for returning most library materials anywhere in the state (again, referenced in the ILS/ILL/Discovery Workgroup recommendation)
	Create a repository of information around successful ILS mergers	Workgroup	LSTA/W ISE	\$2,500	No	Spring 2020	Spring 2021	Referenced in the ILS/ILL/Discovery Workgroup recommendation.
	Provide learning opportunities statewide around the topic of Discovery Layers	DPI	LSTA/W ISE	\$5,000	No	Spring 2020	Fall 2021	Could be sponsored conference sessions, summit(s), asynchronous training resources, webinar series, etc.
	Conduct a needs assessment to identify minimum technical requirements necessary to achieve interoperability between different library management software platforms	Workgroup	LSTA/W ISE	\$2,500	No	Fall 2021	Winter 2021	
	Pilot project to show viability between two systems with different ILS. Analyze volume of delivery, e-resource usage,	Project Manager	LSTA		No	January 2022	Spring 2023	

	hold time lengths, circulation							
Recommendation #3: Reduce the Number of Public Library Systems	Draft issue paper(s) on system mergers, county mergers, and lessons learned, including statutory implications that should be considered	DPI	DPI Internal		Yes <a href="#">43.18</a>	Summer 2019	December 2019	John DeBacher
	Establish Implementation Team	DPI	DPI Internal		No	Summer 2020	Summer 2020	
	Review reports created during the implementation process for relevance to this topic	Implementation Team	LSTA	\$1,000	No	Fall 2020	Ongoing	PLSR Steering Committee Final Report Funding Formula Analysis Fiscal Practices Study Collaboration Study
	Identify and document statutory barriers to system and county mergers	Implementation Team	LSTA	\$2,500	Yes <a href="#">43.18</a>	Summer 2020	Fall 2021	Conduct interviews with system directors, system board members, and others who have gone through past mergers, successful or not
	Create a best practices checklist and resource document for public library system boards/member libraries to consider options for filling director vacancies and/or public library system mergers	Implementation Team	LSTA	\$5,000	Maybe <a href="#">43.18</a>	Fall 2021	Spring 2022	

- ~~We should probably indicate timing, right? Or do we solicit that as feedback from COLAND and the Implementation Summit?~~



Draft development timeline:

- ~~Get initial draft out 6/18~~
  - ~~RL3, PLD team, Kurt~~
  - ~~Comments only, comments due by Friday (6/21)~~
- ~~Discuss in detail at 6/24 Library Team Leaders Meeting with John, Kurt, Martha, Ben~~
- ~~Work through comments and additions, send out second draft (6/25)~~
  - ~~Same group~~
  - ~~Comments only, due by Thursday (6/27)~~
- ~~Work through all comments by 6/28~~
  - ~~Share with John Thompson and Paula Kieley for reality check—end of day 6/28~~
  - ~~Comments only, due by end of day Tuesday (7/2)~~
- ~~Draft version to Alison to include in COLAND packet (7/3) — Drop dead deadline is 7/8 before noon.~~
- ~~Present to COLAND 7/12~~
- Share with DPI External Relations group, SRLAAW, LSTA Advisory Committee, and WLA after COLAND sees it (week of 7/15)