

W I S C O N S I N



PLSR

PUBLIC LIBRARY SYSTEM  
REDESIGN PROJECT

# Continuing Education and Consulting Services Workgroup Report

April 2, 2018

This report is part of a larger report presented to the  
PLSR Steering Committee:

<http://www.plsr.info/april2018report>

# Continuing Education and Consulting Workgroup

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## PROJECT MANAGER INTRODUCTION

The report of the Continuing Education and Consulting Workgroup is part of a culmination of a larger process to consider how to best provide public library system services in Wisconsin. Building on the work of many, its goal is to develop a plan for implementation of new models of service. The process, led by a Steering Committee, will result in recommendations from the Steering Committee to the Department of Public Instruction (DPI). The workgroup reports are provided to the Steering Committee as an input to their recommendation process.

In order to develop new models of service, the project manager formed workgroups of community members. The PLSR Steering Committee, with the guidance of the project manager, selected workgroup leads and facilitators from a pool of applicants for each service area and assigned liaisons from DPI and the Steering Committee to each group. In March 2016, the facilitators, leads and liaisons to each workgroup reviewed the applications from potential participants to determine the composition of the workgroups.

The following report is the result of the workgroup's consideration of their topic area over the past two years.

### ABOUT THIS REPORT

The PLSR process asked each workgroup to answer the following question in the course of their model development: what is the best way to maximize resources, improve services and provide increased equitable access to services? They were not asked to recommend an overall structure for collaborative public library services (i.e. determining if there should be library systems), who might provide the services described or how the services would be funded.

To answer the question posed to them, the workgroup created a model of service, which is included in the following report.

In addition to the service model, the report includes suggestions or recommendations in the following areas. The intent of these recommendations is to provide the Steering Committee with information as they consider overall governance and structure.

### STAFFING MODEL

Recommendations include the number of positions and descriptions of the job duties. The staffing numbers account for management of the service area but not overall administrative staffing, as those considerations will be taken up by the Steering Committee.

## ESTIMATED BUDGET

Rough figures for what the new model might cost. These are generally presented as a range of costs. Some costs, such as equipment, are service area dependent and are included in the recommendation. There are costs, however, that cannot be included in the service area budgets either because the cost cannot be known until the overarching structure is determined or because there is a philosophical decision that would need to be made by that overarching structure in order to determine costs. The workgroup discussed these costs and details of those discussions can be found in the Project Manager's report.

## IMPLEMENTATION

The workgroup has provided recommendations related to implementation that include priorities for implementation, what might be easier to implement within the existing structure and barriers or concerns around implementation. Implementation recommendations are limited; any implementation of service models depends heavily on the structure recommendation from the Steering Committee and the subsequent work of DPI.

## GOVERNANCE

The workgroup has provided recommendations for service accountability and service user involvement, including feedback mechanisms.

## SOME POINTS TO KEEP IN MIND WHILE READING THE REPORT

### THE REPORTS ARE LIMITED TO THE SCOPE OF THE WORKGROUP'S CHARGE

The workgroup was instructed to focus on how best to deliver services and how to deliver the best services. The Steering Committee is responsible for making recommendations related to funding, structure and administration. Therefore, the report does not include answers to questions such as:

- Will there be systems and, if so, how many?
- Who will provide services?
- How will services be funded?
- When will it be implemented?
- What exactly will governance look like?

## CONCENTRATING ON STAFFING NUMBERS IS NOT GOING TO GIVE AN ACCURATE PICTURE OF WHAT IS BEING PROPOSED

The workgroup was asked to provide an ideal organizational chart for their service area once the service area was completely up-and-running in the new model. At the same time, many of the workgroups proposed implementation plans that ramp up the services over a period of many years and provide for assessment of staffing levels during that time so that, once fully implemented, the service area is appropriately staffed.

## BUDGETS ARE ROUGH, BALLPARK ESTIMATES

Implementation is where costs will be more precisely determined. The costs in this report are ballpark estimates that give a sense of cost to help contextualize the models.

## GOVERNANCE RECOMMENDATIONS ARE GENERAL AND LIMITED TO ASSESSMENT WITHIN THE MODEL

Without a clear understanding of structures supporting the service models, the workgroup was unable to offer governance and accountability recommendations beyond the scope of the services. For example, the workgroup could not recommend appointing authorities, though they could recommend oversight bodies for the service.

## THE MODELS ARE FUTURE FACING BUT NOT FUTURISTIC

The workgroup was given a service area to consider and was asked to redesign the current service while keeping in mind the future. As they each developed their model, they considered how it would support change and growth in the future, but they were not designing models that focused on (or predicted) future services.

## THE REPORTS ARE NOT THE END OF THE PROCESS

While these reports are an important step in the process, they are far from the end. The Steering Committee will work with Core Recommendation Collaborators, Model Development Summit Participants and a facilitator to build their recommendations for DPI. In addition to the workgroup recommendations, many other sources of information will be considered during the Steering Committee's recommendation development process. After the Steering Committee submits their recommendations to DPI, there are a number of steps and processes that DPI may undertake to further vet the recommendations with the library community and others.

For more information about the process and reports, please see the complete Project Manager's Report, linked from <http://www.plsr.info/workgroups/workgroupreport/>

## MODEL OVERVIEW

Consulting and Continuing Education staff will collaboratively work together across the state to reach shared goals and to deliver dependable, high-quality and equitable service to all public libraries in Wisconsin.

A Consulting Network will operate with a single mission that supports consistent and equitable service, which is not only essential for customer service but supports consultant training, risk-taking and decision-making. The workgroup created a structure in which:

- “One call does it all” to provide libraries a method to easily contact and connect with the assistance they need
- Integrated consultant teams will provide service enhancement expertise with local, regional, state and national perspectives
- Consulting for immediate, ongoing and developing needs in Services, Organizations and Facilities will be available to all library staff in all public libraries in Wisconsin
- Consulting services will be available wherever needed (in-person, online portal, remotely, etc.)
- CE consultants will provide coverage throughout the state by working with subject specialists, other consultants and other organizations and agencies to provide in-person workshops, online opportunities and other offerings for library staffs and volunteers.
- This model is flexible enough to fit within any structure recommended by the Steering Committee and builds on existing strong relationships.

## WORKGROUP MEMBERS

Tracy Herold, Dane County Library Service (Co-Lead)

Mark Ibach, South Central Library System (Co-Lead)

Barbara Draeger, New Berlin Public Library (Co-Facilitator)

Karol Kennedy, Menomonee Falls Public Library (Co-Facilitator)

Jean Anderson, South Central Library System

Shawn Brommer, South Central Library System

Sha’Nese Burnell Jones, Milwaukee Public Library

Jennifer Chamberlin, UW Colleges

Laurie Freund, Bridges Library System

Christina Jones, Fitchburg Public Library

Leah Langby, Indianhead Federated Library System

Sarah Lawton, Madison Public Library

Jill Lininger, Oak Creek Public Library

Sherry Machones, Northern Waters Library System  
Jamie Matczak, Nicolet Federated Library System  
Rachel Muchin Young, Frank L. Weyenberg Library (Mequon-Thiensville)  
Krissy Wick, Madison Public Library

*Past members*

Terrie Howe, DPI Liaison  
Jennie Stoltz, Pewaukee Public Library

*Steering Committee Liaisons*

Kent Barnard, Patterson Memorial Library (Wild Rose)  
Bridget C. Christenson, Hatch Public Library (Mauston)

*DPI Liaisons*

Tessa Michaelson Schmidt

## CHARGE OF WORKGROUP

The Consulting Services and Continuing Education workgroup will create a flexible, statewide Public Library Service Model that provides equal access to consistent consulting services, innovative continuing education strategies and quality training methods and resources that support the needs of public libraries of all sizes throughout the state. This model will empower Wisconsin public libraries and staff through its focus on equity, development and support with the result being staff that is well-equipped and trained to best support the needs of library users in Wisconsin.

## BACKGROUND

The elements of equity, collaboration, efficiency, flexibility and accountability drive the model presented by the Consulting Services and Continuing Education workgroup. The workgroup began the process as two separate groups focused on two areas of service: Continuing Education and Consulting. Similarities in approach and need between the groups became apparent by the time workgroups presented model frameworks at the WLA conference in 2016. For example, each group quickly realized the lack of equitable services available within library systems around the state and that we could expand collaboration and share skill sets across systems to remedy the inequity. The Continuing Education workgroup had identified some crossover of expertise and services to more than one library system; this blended with the

direction the Consulting workgroup was headed and it made sense to combine these workgroups. The groups' initial models complemented one another; the combination of these models led to the model proposed in this report.

The model focuses on providing equitable service to all public libraries in Wisconsin, regardless of size, location or budget. It was clear from the data analyzed by the workgroup that libraries around the state were receiving very different levels of Continuing Education (CE) and Consulting services. Each system structures their CE and Consulting services based on the system budget and staffing. While each system strives for high-quality service in these areas, the inequity of how these services are staffed was clear. Some have staff dedicated to CE and Consulting service; some derive service from a system director who fulfills multiple system service roles; some do not receive CE or Consulting services at all. The model set forth in this report aims to repair this inequity.

The CE and Consulting model aims to provide an adequate number of full-time employees (FTEs) to provide consistent, high-quality services to all Wisconsin public libraries, and allow staff to focus their skills in specific areas of CE and Consulting. As mentioned above, the inequity of current services stems from inconsistency from system to system and a lack of appropriate staffing levels to provide libraries with the level of support they need to serve their customers. The numbers derived for this model were generated by looking at current levels of CE and Consulting in systems where service seemed abundant and well-staffed, as well as systems where these services were more of a secondary offering and had no dedicated staff. The workgroup incorporated feedback regarding these staffing levels into several discussions and analyzed the data further to confirm the levels set forth in the model.

The model addresses the issue of equity of CE and Consulting services to all public libraries in Wisconsin by embracing a collaborative style. It is assumed that libraries are better served when the CE and Consulting staff are well-connected and informed of what libraries are doing throughout the state. The model aims to serve libraries regionally, but not be bound by regional borders, so that there is a shared awareness about where libraries need help, be it continuing education, Chapter 43, planning or facilities management. This shared awareness allows the consultants to not only provide service as needed but also to use the consultants' network to anticipate libraries' needs.

To maximize effective cross-utilization of skills, the model provides for a collaborative management team to oversee CE and Consulting services throughout the state. The workgroup discovered in the research building up to this report that each library system has a different mission, and therefore 16 different missions govern Continuing Education and Consulting



services statewide. The model presented here provides for one, unified, statewide mission for CE and Consulting services. Under this model, the collaborative management style allows all consultants to focus on one mission and therefore creates greater consistency and equity of service for all Wisconsin public libraries.

## CURRENT ISSUES AND DESIRED OUTCOMES

- Equity
  - Libraries across Wisconsin, and by extension the communities and individuals they serve, receive different levels of service dependent upon varied financial and human resources
  - Few consulting or continuing education resources are available at a system-level in some less populated areas of the state due to the current funding model
  - Access to subject area specialists, for the most part, is limited to the expertise available in each region
- Efficiency
  - Minimize duplication of services, particularly with regard to continuing education offerings
  - Collaboration will provide consistent and dependable service to all libraries throughout the state
  - A one-stop-shop for help (the portal – covered later in the report) will be more efficient for librarians, but also it will be more efficient and consistent to have one portal shared and maintained statewide
  - A one-stop shop for help (a consultant who acts as each library's case manager) will be more efficient for librarians
  - Subject area experts that can serve the whole state and can more efficiently suggest resources to assist libraries
- Accountability
  - Common, shared assessment of services
  - Service model and services being constantly evaluated
  - Improved support for continuous improvement efforts between libraries, regions and the state to better meet service expectations and standards
  - Though access to regionally-developed CE offerings are available statewide, library staff don't necessarily have a direct connection with CE consultants to provide input or ask questions
- Comprehensive services
  - Statewide network of consultants will be available to assist each other in an intentional way

- Under the new model, every library worker in the state has access to the whole range of consulting services and resources

## WHAT THE GROUP HOPES TO ACHIEVE WITH THEIR RECOMMENDATIONS

The CE and Consulting workgroup strove to create a flexible service model to provide consistent, quality, high-level training and resources that support the needs of libraries of all sizes throughout the state. This service model will focus on building equity, trust and relationships by supporting and empowering local Wisconsin libraries. The goal is to leverage collaboration and continuity of service across the state in order to move beyond silos toward an improved horizon for all Wisconsin public libraries.

## EQUITY MEASURES

### CONSULTING

Consulting services to member libraries are typically provided directly by system staff to their member libraries, while in other cases there are contractual arrangements between systems. A 2015 survey of library systems for the PLSR process asked systems to share how they provide consulting services for a number of subject areas.

Most systems indicated that they provide minimal consulting by answering questions related to administration, adult services, advocacy, board development, building and remodeling, collection development, county issues, data and demographics, early literacy, grant writing, legal issues, public relations and marketing, reference, inclusive services, state annual reports, technical services and youth services. There are many systems that offer in-depth consulting for many of these areas, in particular, library administration and state annual reports, with over half of the respondents providing in-depth consultations.

Consulting is also delivered by some systems as coordinated projects. This is most commonly provided in the areas of inclusive services, early literacy, state annual reports and youth services. This type of coordinated consulting often takes the form of workshops, training documents and other coordinated training.

On the statewide level, the Division for Libraries and Technology (DLT) at the Department of Public Instruction (DPI) provides consulting services for libraries across the state, offering guidance on legal issues, inclusive services and more. This consulting generally takes the form of questions and answers but may be more in-depth depending on the library's needs. Additionally, libraries may, of course, contract with consultants, most commonly building experts and strategic planning consultants.

The landscape of consulting services means that some libraries have access to a depth of consulting expertise while others do not and, at the same time, expertise may be duplicated and possibly underutilized. When access to consulting expertise is limited or not available at all in a region, library staff either do without the assistance of expertise or have to seek services elsewhere, including relying heavily on assistance from consulting staff at the DPI.

#### CONTINUING EDUCATION

Currently, systems are required to provide continuing education opportunities to their member libraries' staffs, but no specifics regarding quantity or quality of continuing education are mandated. The statutory language states: *43.24(2) For a public library system to qualify for and maintain its eligibility for state aid, the system must provide "(e) In-service training for participating public library personnel and trustees."*

Aside from the library director certification requirements, there are no standards that define what is considered in-service continuing education and what are library system operational trainings for library member staff such as ILS training, delivery process and system participation requirements.

The model seeks to build on the success of the continuing education collaborations already happening throughout the state. Here are a few examples of these strong collaborations.

- Southeast Wisconsin (SEWI) systems, which is a collaboration maintained by the Bridges Library System. Arrowhead, Bridges, Lakeshores, Kenosha County, Milwaukee County Federated and Monarch Library Systems share continuing education opportunities with all staff members of their respective member libraries, by listing upcoming in-person CE workshops available in the region, Wisconsin webinars and webinars that are available for free that are from outside of Wisconsin as well as from other organizations.
- South Central Library System hosts trustee events that are sponsored by many systems around the state.
- Nicolet Federated Library System coordinates the Wild Wisconsin Winter Web Conference, with the Indianhead Federated Library System and South Central Library System sharing hosting duties for the event.
- Technology Days is a newer event coordinated and sponsored by a number of systems across the state.

Individually, systems provide different levels of continuing education for their members, ranging from in-service opportunities to sharing opportunities through newsletters or other

communication channels. New director orientation varies as well, from multiple visits by system staff to the new director's library to invitations to visit the system office.

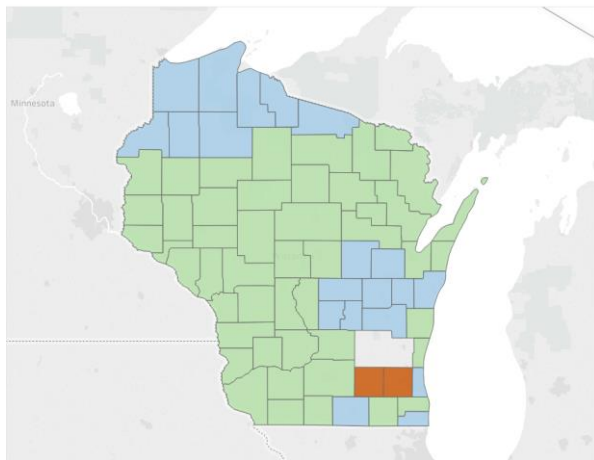
These different approaches, of course, mean that access to continuing education varies from system to system and library to library. However, because the culture of collaboration is so strong in this service area, there are already examples of regional and, due to remote learning opportunities, statewide, continuing education collaborations that are a strong basis for the workgroup's service model recommendations.

The following maps demonstrate the inequity of consulting and continuing education services offered by library systems throughout the state. All use the same legend (except where noted), with grey indicating no services provided, and orange indicating all consulting types are offered. Note that two counties, Washington and Dodge, are shown in white. At the time of the survey, they were in the process of merging with Eastern Shores Library System and became, along with Ozaukee and Sheboygan Counties, Monarch Library System. In all, the survey addressed 14 distinct areas.

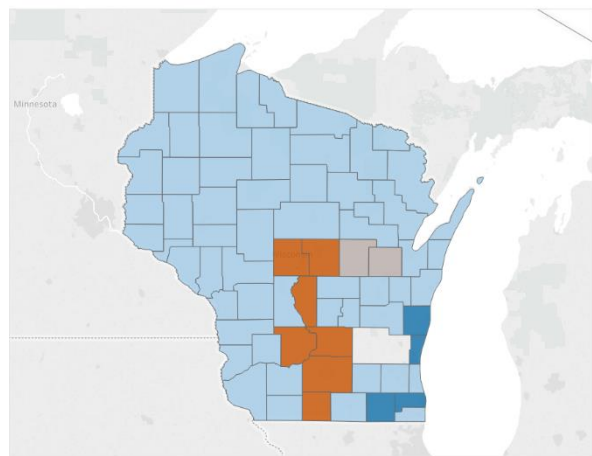
#### Services Provided

- No Service Provided
- Q&A Only
- In-Depth Consulting Only
- Coordinated Projects Only
- Q&A and In-Depth Consulting
- In-Depth Consulting and Coordinated Projects
- Q&A and Coordinated Projects
- All Consulting Types

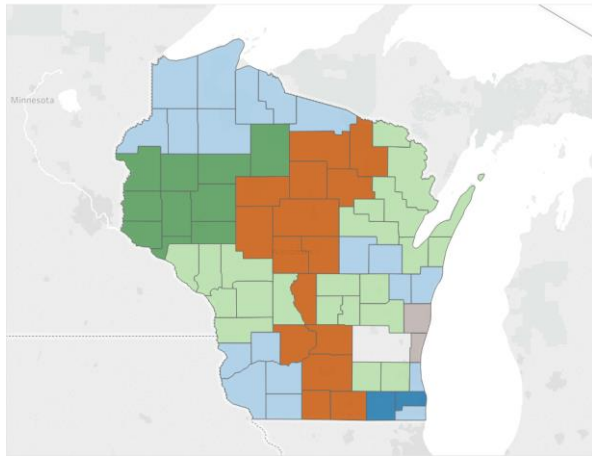
Administration



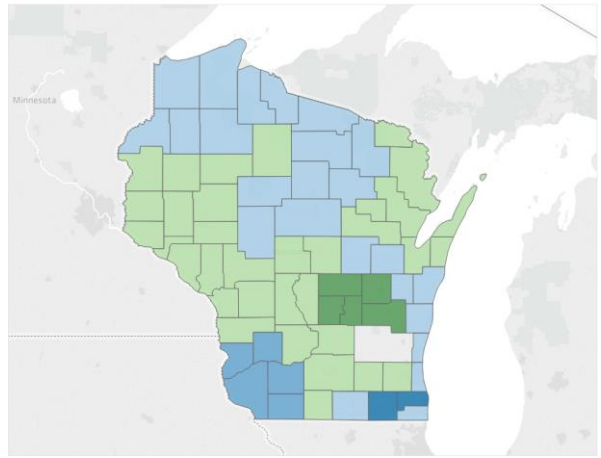
Adult Services



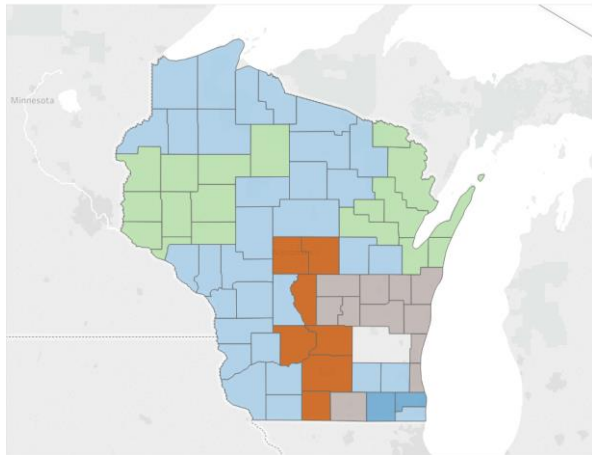
Advocacy



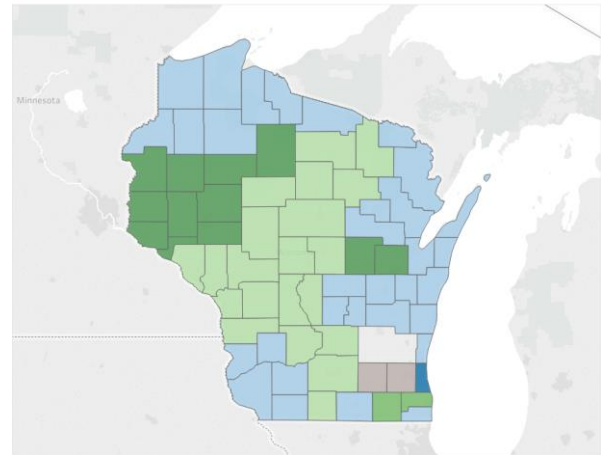
Board Development



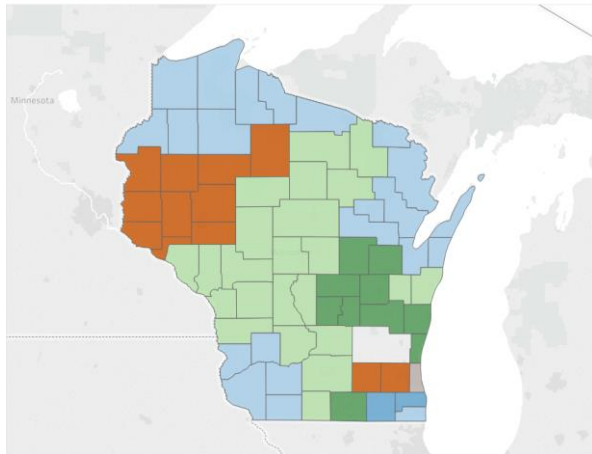
Building & Remodeling



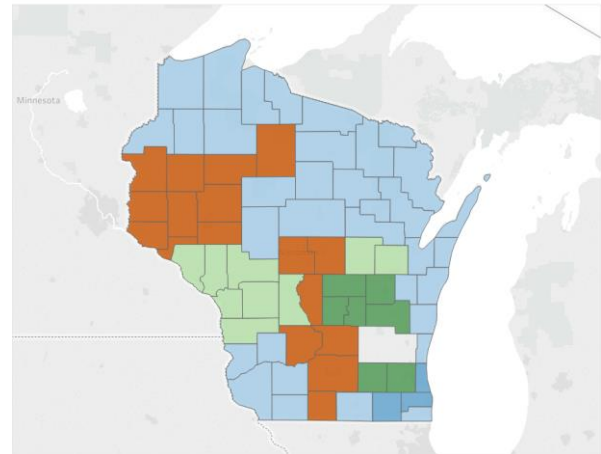
Collection Development



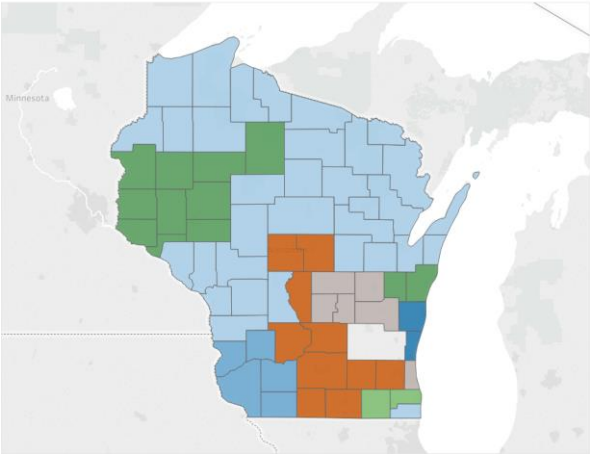
County Issues



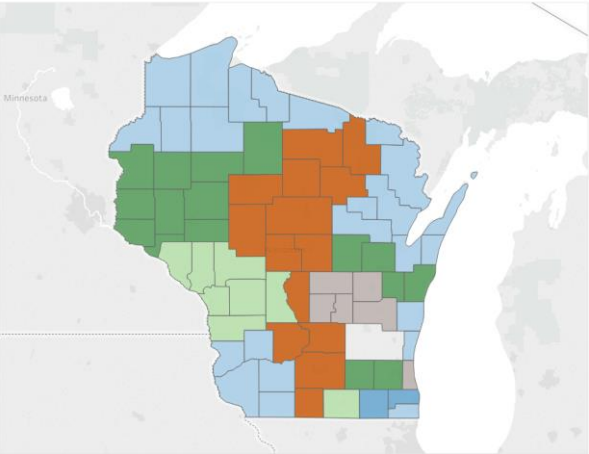
Data & Demographics



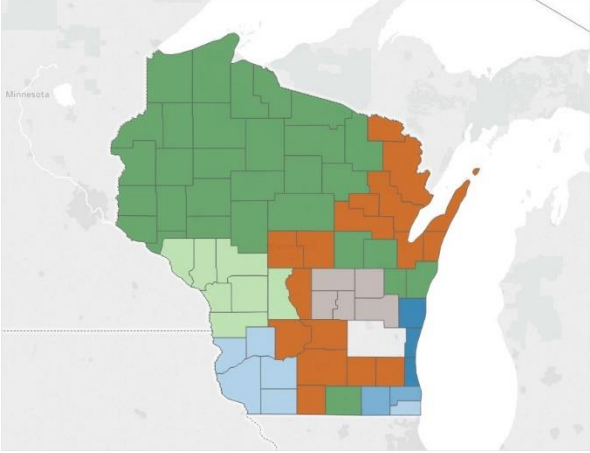
Early Literacy



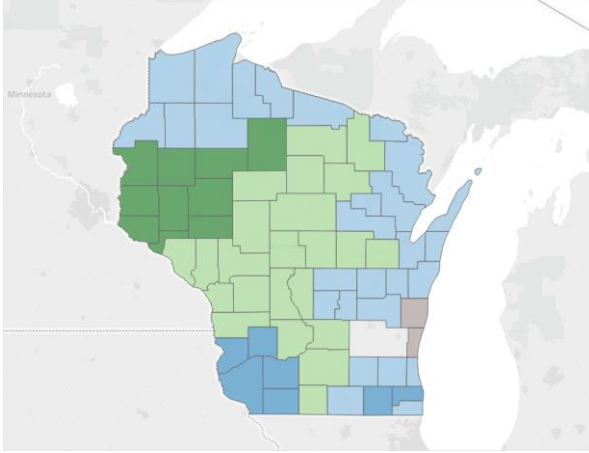
Grant Writing



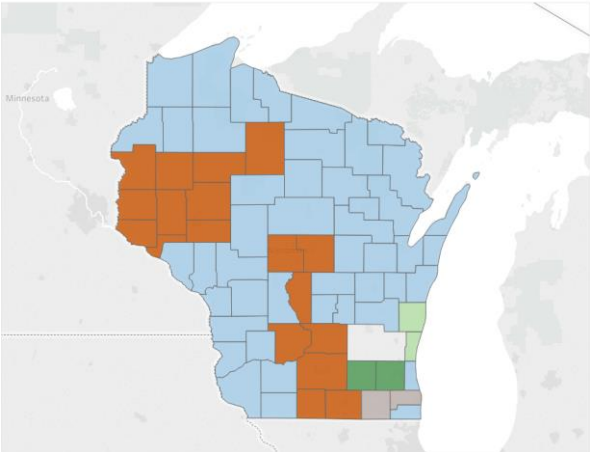
Inclusive Services



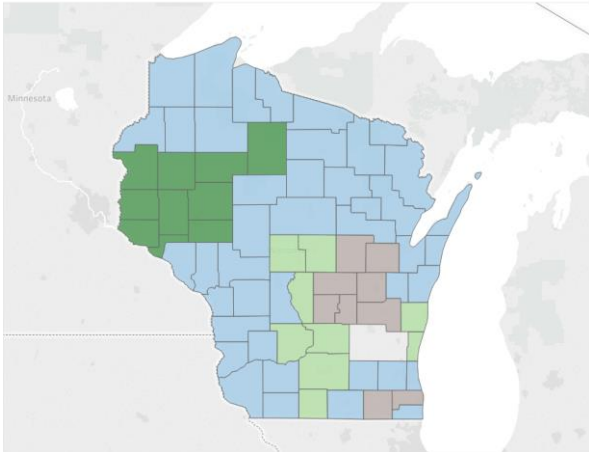
Legal Issues



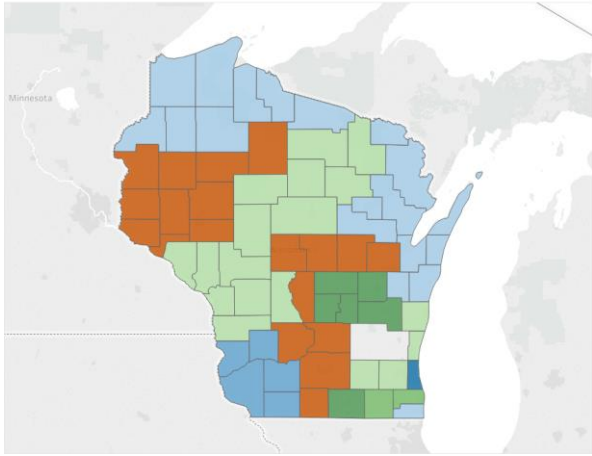
PR and Marketing



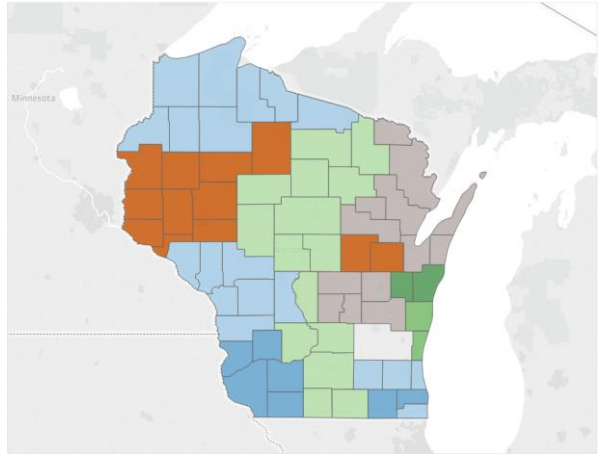
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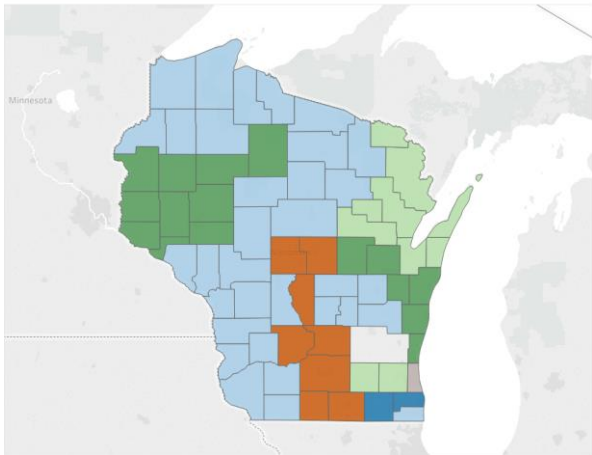
State Annual Report



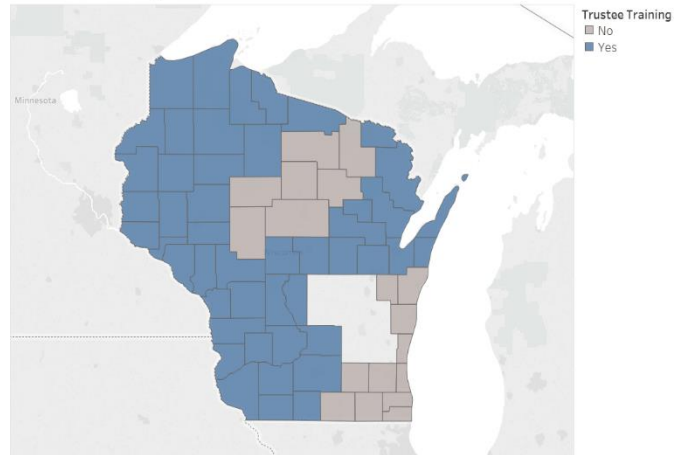
Technical Services



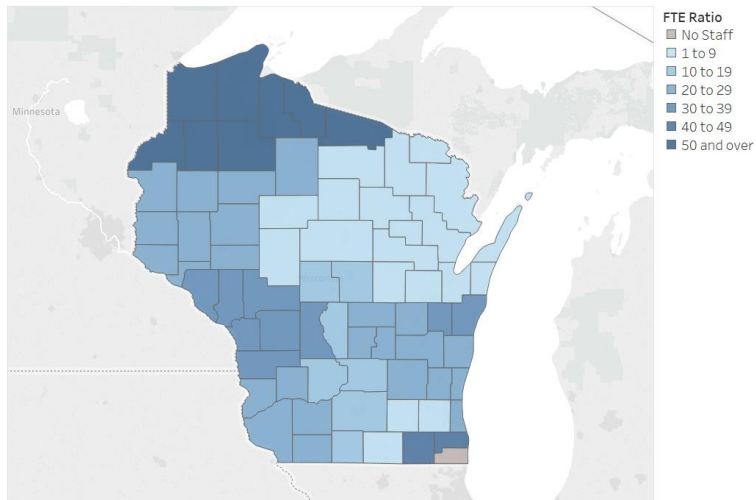
Youth Services



Trustee Training



Libraries per FTE



The final map illustrates the inequity of service providers. The workgroup relied on past information gathered to calculate the number of FTE in systems providing consulting and continuing education services. This included the Lean workgroup report, 2015 PLSR survey of systems and 2017 information gathered by the PLSR Funding and Cost Standards Subcommittee, which is what is depicted in the map (See Appendix A: Consultant to Library Ratios).

While in some parts of the state, as shown in the lightest blue, each system consultant works with only one to nine libraries, in counties shown in the darkest blue, one consultant serves 50 or more libraries. Some areas of the state may have full-time staff dedicated to specific consulting areas, while in other regions consulting is just one of the many system service roles a staff member may fill.

The primary goal of the CE and Consulting workgroup is to reduce these inequities without reducing service to libraries that currently have access to dedicated consultants with expertise in different areas of library service support and a variety of excellent learning and training opportunities. The ideal result of reaching the goal is that all libraries will have the same access to a high level of library service consulting and continuing education support.

## PROCESS TO DETERMINE RECOMMENDATIONS

### GENERAL DESCRIPTION OF MEETINGS AND PROCESS

Initially, the Consulting and Continuing Education were two separate workgroups. The Continuing Education group met June 6, 2016, through February 10, 2017, in-person and via virtual meetings, seven times. The Consulting workgroup met May 31, 2016, through February 10, 2017, mostly virtually, but twice in-person, eight times.

After the workgroups shared their models at the 2016 annual WLA conference, the model and service vision similarities were obvious. At a joint meeting on February 10, 2017, the workgroups decided to officially merge groups and models. The workgroup at this point divided into three teams: administration, portal and services. These subgroups met on a regular basis to develop processes related to their areas and then reported back to the full workgroup, which met ten times, both in-person and virtually since combining.

Members from this workgroup were included on the Defining the Help Center, Refining and Defining Continuing Education and Regions Topic Teams. The Topic Teams were made up members of different workgroups to develop recommendations on common issues or needs related to their service areas. The recommendations of these teams helped guide the



workgroup's service model recommendations related to help desk staffing and content as well as CE and Consulting's relationship with the ILL/ILS, Technology and Collections workgroups.

## INFORMATION GATHERING

The Consulting workgroup distributed information gathering tasks amongst its members. Members conducted interviews with library and non-library consulting providers in Wisconsin (the Aging Resource Center, Cooperative Educational Service Agencies (CESA), University of Wisconsin-Extension and WiLS (Wisconsin Library Services) as well as Library Strategies, a library consulting business based in Minnesota. The workgroup also contacted other states to learn about consulting services outside of Wisconsin.

The Continuing Education workgroup conducted a similar approach to information and data gathering. Group members contacted CE providers in Georgia, California and Minnesota to learn how those states delivered CE to public libraries.

In addition to the other states and organizations the workgroups researched (See Appendix B: CE and Consulting Research List), members participated in the informational calls with other states arranged by the project managers and analyzed survey information gathered from systems by the project manager describing CE and consulting in Wisconsin.

To learn how they provide consulting and continuing education services, the following questions were asked of each state:

- What kinds of consulting do you offer?
- What, if any, are the expectations of libraries for consulting services?
- How do you structure your consulting services?
  - Geographically
  - By consulting area
  - Staffing
- How are these services funded? Are they free or are there charges for service?
- Are consulting services consistent throughout the state or do they vary?
- Are there standards for consulting services put forth by statute or other formal structure?
- What are the legal requirements for providing consulting services?
- Does your state offer online access to consulting resources? If so, how much is this resource used by libraries?

From these conversations, the workgroup determined there is no one right way to provide Consulting and CE services. Workgroup members learned about what worked and didn't work from the other states and agencies and applied select services and outcomes to our model. For example, in Georgia and California, an online portal and Learning Management Systems (LMS) are central to providing continuing education services to their libraries, which leads to the portal and LMS being an integral part of the workgroup model. With the exception of California, the states that require certification for library directors (or staff) have a more robust continuing education program, including Wisconsin. This may be one reason other states look to Wisconsin as an example of effective continuing education for library staff.

The states and agencies contacted provide varying degrees of consultant services; for example, in Minnesota, consulting services are inconsistent and vary from one system to another, and in Virginia, member libraries do not pay for consulting services. In addition, several states that went through library system restructuring processes reported that they looked at Wisconsin's Public Library Systems as a model of successful consultant service. A common theme emerged: the states and agencies that focused on personal connections and equitable service had the most successful results. This influenced the emphasis of the CE and consulting model on relationships and equitable access to services for all Wisconsin libraries.

## FEEDBACK POINTS AND MODEL REFINEMENT

The workgroup administered an eleven-question survey to the Wisconsin library community in order to learn more about common topics important to librarians and how librarians prefer to receive services. (See Appendix C: CE/Consulting Services Survey). The survey was shared with the PLSR Survey Panel and was open 5/22-5/31/2017. In total, there were 88 responses. The workgroup used the results to help determine the demands for in-person consulting or CE at a regional level, which services may be best provided remotely and what kinds of services are most important to librarians.

After the workgroup's 2017 WLA Conference session, the workgroup received emails through the PLSR contact form asking for clarification of staffing numbers. This feedback helped the workgroup articulate that the FTEs proposed in the model are just that—proposals. As the group explored the services to be provided, determining FTE values for each was a way of assigning value/importance or workload to that particular area. The group was able to note that they understood that the FTE recommendations may require future modification, but believed it was more prudent to wait for definitive budget numbers and broader understanding of other organizational and operational factors that will impact and dictate future service.

Additionally, the workgroup vetted their CE Service Model, Facilities Service Model, Organization Service Model, Portal Service Model and their overarching Service Model with their Review Panel. The workgroup review panel consisted of the following people:

- Members of the System and Resource Library Administrators' Association of Wisconsin (SRLAAW)
- Larry Oathout, Portage County Public Library
- Krista Ross, SELCO in MN, formerly of Southwest Wisconsin Library System
- Amy Stormberg, Amery Area Public Library

As noted, the CE and Consulting Services workgroups merged in February 2017. Over the course of the following year, the workgroup met and refined a model that would serve both Continuing Education and Consulting Services.

Prior to the workgroup merger, the Consulting workgroup determined that consulting is rooted in equity, sustainability, trusting relationships, adaptability, coordinated communication and community responsiveness. In order to provide the best library services to Wisconsin residents, Wisconsin libraries will have access to a **Consulting Network**. The Consulting Network will operate with a single mission that supports consistent and equitable service, which is not only essential for customer service but supports consultant training, risk-taking and decision-making. The workgroup created a structure in which:

- "One call does it all" to provide libraries a method to easily contact and connect with the assistance they need
- Integrated consultant teams will provide service enhancement expertise with local, regional, state and national perspectives
- Consulting for immediate, ongoing and developing needs in services, organizations and facilities will be available to all library staff in all public libraries in Wisconsin
- Consulting services will be available wherever needed (in-person, online portal, remotely, etc.)

The workgroup discussed survey results from the library community, comments from attendees at the 2017 WLA Conference and reviewed panel feedback, incorporating where appropriate.

Development of an online portal is extremely important to the success of the CE and Consulting model. A portal has figured into the CE portion of the model since the very beginning of this process. The online portal is the backbone to providing consulting, continuing education and other library services. For CE and Consulting, the portal will include a Learning Management

System to facilitate director certification, continuing education registration and tracking, calendar of events, archived webinars and program materials and a Knowledge Base (see Portal section for more information). As other workgroups indicated the need for an online portal, this tool will need to be designed with the end user (library staff) in mind as well as consultant staff providing and producing content.

Currently, organizational and strategic planning is a part of the organization service model with two (2) FTE planning consultants. The workgroup talked about strategic planning and the time commitment required from a consultant for this service and came to the conclusion that the service would not include the entire planning process. Rather, consultants such as a data expert, continuing education and community engagement could be a part of assisting a library with a planning project. Also, based on feedback, the model was adapted to include facilities consultants as part of the organization consulting team.

There was feedback shared with the workgroup that questioned the number of staff needed for the service model and how the group determined the staffing levels. The workgroup discussed the staffing ratios of the model. After much deliberation, the workgroup maintained the total staffing number of 53 FTE for their model. It is important to note that 53 is not necessarily the number of individual consultants as some may have dual roles or be part-time. The decision to maintain the model with the 53 FTE staffing model is based on an effort to increase and improve equity of services to all libraries in the state.

## SERVICE MODEL RECOMMENDATIONS

### GENERAL OVERVIEW

The workgroup has organized consulting and continuing education into four service areas with an online portal as a fifth area that will be utilized by each of the four services.

- *Continuing Education* - professional development opportunities for library staff and volunteers
- *Services Consulting* - assisting or providing guidance to library staff to deliver quality library services to their communities
- *Organization Consulting* - administrative, planning and data collection services to help libraries with day-to-day administration of the library, meeting legal requirements and being positioned to serve their communities into the future
- *Facilities Consulting* - facilities maintenance and planning support from new building project assistance to helping a library reimagine and redesign the use of an existing space

- *Portal* - An online content management system that can serve as a central hub for statewide information and as help desk as a key component to a variety of service models being designed by PLSR workgroups

To determine staffing levels, the workgroup relied on past information gathered to calculate the number of FTE in systems providing consulting and continuing education services. The past information reviewed included the 2014 Lean study workgroup, a 2015 PLSR survey of systems and 2017 information gathered by the PLSR Funding and Cost Standards Subcommittee (See Appendix A: 2017 Consultant to Library Ratios). The information shows a range of 20-29 FTE staff dedicated to CE and consulting 20-29 FTE as reported by library systems for those years.

The following service and staffing summary descriptions, along with a more detailed list of specific services and topics and potential portal resources for the four services (See Appendix D: CE/Consulting Detailed List of Services), provide the complete picture of the CE and consulting services this model proposes are available to all libraries.

## CONTINUING EDUCATION

### *Introduction*

Continuing education (CE) is essential for library directors, staff, board members and volunteers. Wisconsin state statutes require that library directors maintain certification through continuing education activities. Accessible high quality continuing education is important in maintaining and advancing Wisconsin public libraries.

The goal of CE services is to provide exceptional coverage throughout the state by working with subject specialists, consultants and other organizations and agencies to provide in-person workshops, online opportunities and other offerings for library staff and volunteers.

The CE consultants will focus on offering diverse professional development opportunities for the growth of library staff and volunteers. Onboarding and training for new and existing library staff will be carried out by local libraries.

Currently, CE is not being offered consistently with systems and libraries, resulting in varying levels of service. Some collaboration is happening now, and this model would improve those endeavors. Many CE consultants are providing other services in addition to CE. This model proposes dedicated CE consultants to provide needed CE activities and opportunities to all libraries.

### *Continuing Education Consultants - 6 FTE*

The workgroup developed a model to provide adequate coverage across the state while recognizing that although budgets have not yet been discussed there will be funding challenges. The proposed number of CE consultants reflects the approximate number of current CE providers in library systems serving libraries throughout the state.

## SERVICES CONSULTING

### *Introduction*

Services consultants focus on assisting or providing guidance to library staff to deliver quality library services to their communities. Whether the library wants to enhance current services, identify new trends or develop new services, a services consultant can help. Service areas covered may include youth, adult, general library, programming, inclusive, marketing and advocacy and partnerships.

These consultants will be located around the state and provide a personal, local connection for libraries to the Consulting Network. This staff will be responsive and proactive by connecting libraries to each other through collaborative projects, providing access to the right expertise or sharing resources in a variety of ways.

### *Total Services Consultants – 29 FTE*

Services consultants would likely possess shared expertise in multiple areas, so these are estimated FTEs per specialty. To arrive at the recommended staffing levels for services consulting, the workgroup reviewed consulting services provided in other states and consulting services and ratios currently provided by Wisconsin's systems, especially those reporting a high level of satisfaction with their current consulting services. The proposed FTE for the different services consulting areas are as follows:

- Youth (0-18 years) – 6 FTE
- Adult services – 6 FTE
- General library services and programming – 5 FTE
- Inclusive services – 7 FTE
- Marketing and advocacy – 5 FTE

## ORGANIZATION CONSULTING

### *Introduction*

Organization consulting focuses on those services to libraries that in many ways fall outside of the typical "library services" consumed by library users. We have further divided "Organization" into three subsets to better articulate the services provided and to help identify the specific

skills and abilities consultants should possess. These subsets are administrative, planning and data collection, analysis and evaluation.

Some of these services help libraries comply with statutory requirements (Chapter 43, among others), some help with the day-to-day administration of the library and others help to position the library to serve its community into the future. A primary strength of this model is that the 16 FTE organization consultants are not siloed in their respective specialties, but rather are part of a larger team that will meet regularly so that the expertise of all can come into play in any particular project.

The administrative consultants provide services that help libraries comply with requirements outlined in Chapter 43, provide guidance about the day-to-day operation of the library, provide guidance on legal issues and promote and support library advocacy efforts.

The planning consultants will be the statewide experts in the areas of development (volunteers, Friends, foundations) and planning (strategic, technology, sustainability), and will also support library needs in the areas of community building and policies, procedures and standards compliance.

The data consultants will organize and present statewide annual report data so it can be easily used to support the mission of the library. These consultants will also work with libraries to use Integrated Library System (ILS) circulation data to present an accurate picture of library usage. The goal is to use modern tools to present maps and graphic representations of the data and analysis of what it means. Finally, these consultants will also be available to work with individual libraries (time allowing) on special data-gathering projects to address local needs.

#### *Total Organization Consultants – 16 FTE*

For comparison purposes, the workgroup explored the consultant services provided by other states and looked in more depth into the consultant services currently provided by Wisconsin's library systems. The goal was not only to identify what types of services are provided but also to quantify consultant-to-library ratios that result in a manageable workflow on a day-to-day basis. The proposed FTE for the different services consulting areas are as follows:

- Administrative – 10 FTE
- Planning – 2 FTE
- Data Experts – 4 FTE

## FACILITIES CONSULTING

### *Introduction*

Library directors are tasked with a multitude of duties, many of which they must learn after becoming a director. One of the areas that leave directors feeling the most lost is that of facilities planning—whether it be a new building, an addition, or simply re-painting, re-carpeting or selecting new furniture.

Planning a new or reconfigured space to provide the most efficient workflow can be a daunting task, and the ability to do it well often comes only from the experience of having seen what works and what does not. Architects can design a pleasing building, but not all of them have experts on staff who know how to design a balanced space around the work that library staff performs daily and the needs and wants of library users.

### *Facilities Consultant – 2 FTE*

Currently, only one library system employs a dedicated consultant who commits approximately 25% of her total time, with graphic design and other duties filling the rest, providing 54 libraries with facilities consulting. The proposed 2 FTE for facilities consulting for the state is based on this information.

## PORTAL

### *Introduction*

An online content management system that can serve as a central hub for statewide information and as a help desk is a key component to a variety of service models being designed by PLSR workgroups.

The Content Management System, referred to as the portal in our service model, will serve as the online hub of the CE and Consulting model. Although it is impossible for any website to be everything to everyone, this portal will do its best to serve the immediate needs of the Wisconsin Library community in an easy to navigate digital interface. The online services the workgroup would like to see included in the portal are broken out in more detail below.

### *Online Calendar*

The online calendar will be as a compendium of continuing education opportunities across the state with a focus on those developed, planned and/or implemented by the CE consultants. The intent is that the calendar will also include opportunities offered by the two in-state library schools, the Wisconsin Library Association and other organizations that may have continuing education offerings that would be of interest to the state library community.



### *Programming Hub*

As mentioned above, the portal will serve as the continuing education hub for librarians in Wisconsin. All program registration, as well as program evaluations, will be offered through this website. Archived copies of past webinars, handouts related to past programs and past program contact information for programs sponsored by the CE service will all be made available through the online portal. A long-term goal would be to include easy access to other archived webinars and/or handouts from outside organizations, such as the Wisconsin Library Association.

### *Director Certification / Continuing Education Tracking*

Library directors will be provided with a portal account when they begin their position and will use it to track the CE credits they need as part of their Library Director Certification. Directors will be able to fill out the certification paperwork, track their CE requirements and have their credits validated from this central location. They will also use this portal to submit and renew their Director Certifications.

Library directors will also have the ability to set up accounts for individual library staff to register and track individual CE. Ideally, these accounts will be able to move with the individual should they change employment between libraries within the state.

### *Knowledge Base / Consultant Contact*

In an effort to equalize access to consultants across the state, the portal will include a knowledge base. This section of the portal will include resource sections on a variety of topics including, but not limited to: facilities, long-range planning, human resources, policies and procedure review, sample policies and procedures, marketing materials, legal questions, purchasing information, vendor information, grant information and performer contacts. These resource topics will be in a searchable database, but could also be set up as a moderated online forum so that members of the library community could add and/or delete information as it became irrelevant and/or outdated. Consultants in this model will moderate the database to ensure clarity and accurate information.

For those questions not answered in the knowledge base or for times that Wisconsin library staff would like to reach out to a person, the portal would also be the website that staff would go to identify and contact the consultants identified in the CE and Consulting model.

### *Learning Management System (LMS)*

Some of the above components may be part of a Learning Management System (LMS), a software application that administers, tracks, documents, reports and delivers online courses

and content. There are many options to consider when purchasing or subscribing to an LMS (See Appendix E: Learning Management System Specifications). The cost of the LMS will vary based on a number of factors including utilizing a cloud-based or self-hosted service and whether the service has a license fee or is a pay-per-user model. In addition, compatibility with a variety of computer platforms and mobile devices is key in providing this service equitably across the state. Another key element necessary in an LMS for Wisconsin libraries is the ability to record and track other learning events such as conference attendance, university courses or other learning opportunities.

### *Portal Summary*

The workgroup feels that an online portal that provides library staff statewide with access to a variety of resources is a vital piece of the PLSR puzzle. In discussions with other workgroups, we believe there are synergies that can be created and our portal information can be encompassed in a larger, statewide, online help system.

## **STAFFING MODEL**

The CE and Consulting model is rooted in equity, sustainability, trust, adaptability, coordinated communication and community responsiveness. Services are based on personal relationships.

These service tenets form the underpinning of an organizational model focused on a single point of contact approach. In this model, a library director or staff member works directly with a single consultant as the primary contact in requests for consulting assistance. This consultant now becomes the “caseworker” for that person, providing consulting assistance and connecting the person to other experts in the consultant network as needed.

The consultant will touch base repeatedly throughout the consulting project to ensure the best assistance is being provided. In this way, the staffing model reinforces the personal connection that library staff have with different consultants, while using the expertise of the appropriate consultant, but it also allows libraries to draw from a diverse and widespread group of experts.

Portal services will be managed by the continuing education consultants, with the assistance of the technology team. Continuing education resources, including the presence of an LMS, will have a significant presence on the portal, so it is logical that this group manages the content for service areas of CE and consulting.

## CONSULTANT SERVICES COORDINATION, COLLABORATION AND COMMUNICATION

Different combinations of the consulting teams throughout the state will meet and communicate regularly to ensure the sharing of service enhancement expertise and knowledge with local, regional, state and national perspectives.

The consultants will be organized into four service area teams, with one consultant from each team serving as the consulting services manager for that team.

- Continuing Education Consultants Team – 6 FTE
- Youth, Adult and General Library Services and Programming Team – 17 FTE
- Marketing, Advocacy and Inclusive Services Team – 12 FTE
- Organization (Administrative, Data and Planning) and Facilities Team – 18 FTE



Consultants will be geographically dispersed across the state to ensure a regional focus, while being connected to their colleagues statewide. Consultants on the organization and services teams will likely fulfill regional caseworker roles while continuing education and facilities consultants will serve the entire state without regional assignments to specific libraries, though continuing education will ensure its offerings serve specific regional needs in addition to a statewide focus. The administrative model the Steering Committee recommends will ultimately determine potential locations staff will be based out of around the state.

A high level of coordination, communication and collaboration between consulting experts is a necessity to serve libraries across the state. In this way, problem-solving is not done in a vacuum and consultants can anticipate service needs from libraries, rather than simply react to their needs.

Consulting services managers will be responsible for:

- Regional and statewide coordination, collaboration and communication within individual service areas and among consultants across the four service area teams
- Staff hiring, professional development and evaluation
- Long-term services planning
- Budget development and management
- Consulting services communication and coordination with other areas of coordinated services to libraries

## ESTIMATED BUDGET

The workgroup identified the following areas to include in the budget for their model. A summary table of the budget for the workgroup is included as Appendix F: CE/Consulting Workgroup Budget Summary.

## ANNUAL STAFF SALARIES

Costs for the staffing model described above were developed using the common staff salaries described in the Project Manager's report and the Human Resources Subcommittee recommendation of 28% for benefits. The total annual staff compensation would be \$4,122,624. The salary calculations are included in Appendix G: CE/Consulting Staff Salaries Calculations. It is important to note that the model seeks to maintain the high levels of service being offered in different areas of the state. Successfully implementing this model will require leveraging the relationships of existing consultants along with their knowledge and experience. The workgroup sees a gradual process of adding consultants based on available funding and the

data and information gathered as the model is implemented to help guide any determinations of need and priority.

## **PROGRAMS, WORKSHOPS AND MEETING EXPENSES**

The approximate amount library systems are currently budgeting for these expenses, according to 2017 proposed budget information gathered by the Funding and Cost Standards Subcommittee, is \$223,824. Because it is not possible to make an estimated prediction of the economies of scale that may be gained or potential additional needs to enhance services in some regions, the workgroup is comfortable with this as the starting amount when implementing the new model.

## **MEMBER GRANTS AND PROFESSIONAL DEVELOPMENT SUPPORT**

A number of systems provide grants and other support to libraries to help staff participate in professional development opportunities, including fees for workshops and conference registration costs. Based on existing amounts funded to libraries in the state, the workgroup determined an average of \$200 per library being budgeted for this for an annual total of \$76,200.

## **PROFESSIONAL COLLECTION**

Based on the existing amount budgeted by systems and the higher cost of professional collection materials (includes books, journals and e-content) the workgroup calculates \$20,000 per year for this expense.

## **LEARNING MANAGEMENT SYSTEM (LMS)**

Options for an LMS include open source platforms with no monthly cost to other cloud-based options ranging from less than a \$1.00 per month per registered online learner to more than \$4.00. A number of products have enterprise packages available that require a more extensive pricing process with vendors to secure an accurate cost. In addition, there are potential options available through the state that can be explored. In order to identify the best option and accurate pricing, the workgroup recommends the CE services team works together with technology staff to develop specifications for an RFI.

## **OTHER SERVICES**

There are other consultant services library systems currently provide or have provided in the past which the workgroup decided to not include as items funded by this service model. However, providing these services to libraries may be considered in the future on a cost-recovery basis or subsidized with state funding. One example of this is printing for libraries. A

few systems currently offer this service for their members and other systems have done so in the past. In systems where this is offered, printing is significantly cheaper for libraries than pricing through commercial printing services. If this would be provided for all libraries, it is estimated that four or five high-quality copiers around the state would be able to meet demand. On average, the average annual cost of a copier is \$20,000, including all maintenance and toner. Printing services could be offered on a cost-recovery basis or a tiered approach in which each library is allocated a certain number of free copies before paying.

Due to the nature of their work, consultants are typically very active in all types of learning and information sharing opportunities around the state, including conferences. For the administrative recommendations of the Steering Committee's report, all consultant staff will need to be accounted for when considering travel and conference allocations.

### **MODIFICATIONS THAT CAN BE MADE BASED ON BUDGET CONSIDERATIONS**

This model is dependent on adequate staffing levels, a portal to provide accurate and relevant information and a learning management system (LMS) to create efficiencies and consistency across the state. If modifications were to be made based on a budget in any one of these areas, the desired levels of efficiency, flexibility and service would be affected.

Elimination of the LMS would result in the need for additional staff to perform tasks without the benefit of automation. The workgroup estimates three additional CE FTE. Cuts in staffing levels may lead to a reduction in the direct services that can be offered. The recommended staffing for this model came after much research and discussion, and we believe provides ratios that will allow statewide equitable service, flexibility and efficiencies. The model also works well with other workgroup models.

### **WHY THIS MODEL**

The strength of this service model is centered on collaboration and connection.

- Consulting and continuing education will be comprised of dedicated professional staff who will work collaboratively toward shared goals. These staff members will be supported by a shared mission of service that is centered on service equity to all public libraries in Wisconsin, strengthened relationships, enhanced levels of service and library innovation.
- As consultants gain specialized expertise, they will become more skilled in their area of expertise, thereby enhancing the services provided.

- Library staff members in libraries of all sizes throughout the state will receive the same high-quality services from statewide teams that work together to address current issues, collaboratively identify solutions and introduce new concepts and innovations to Wisconsin’s public library community.
- Consultant and continuing education team members will participate in regular planning sessions and meetings to connect with each other, work with one another and plan for future needs.
- Through teamwork and intentional connections, consultant and continuing education teams will work together to prevent future service inequities and to create future visions of public library service.

## SERVICE SCENARIOS

### CONSULTING AND CONTINUING EDUCATION SERVICE SCENARIOS—TODAY VS. UNDER THE NEW MODEL

- The following are scenarios that presently occur in public libraries. The scenarios highlight the different outcomes libraries currently experience based on which of the two following levels of system consulting and continuing education is available to a library from their system.
  - System A = has dedicated consultants on staff with the resources available to provide a robust array of services in a number of subject areas with access to these services being available in multiple ways, including in-depth one on one consulting.
  - System B = no dedicated consultants on staff with the only consulting support available being from the system director who wears multiple hats to support the different services or by seeking assistance elsewhere, including DPI library consultants.
- The new model in each scenario highlights what equitable consulting and continuing education offerings could look like in the future.
- 
- This is a sampling of scenarios and by no means an all-inclusive list. The scenarios in the new model are not intended to be an exact description of how service will be provided, as each scenario could be handled with flexibility.

#### **Scenario 1**

A library's community is experiencing an increase in their non-English speaking population and is looking for resources and information about how to serve them.

### *System A*

The library would contact the inclusive services consultant. The system staff would:

- Refer the library staff to online resources (webinars, language help, websites), which the consultant either has at their fingertips or researches before sharing
- Connect them to other libraries in the region, state or country that have developed programs
- Help make connections with community agencies and organizations that serve non-English speakers
- Consider offering a workshop or series of workshops or other continuing education/professional development offerings
- Consider developing a web resource about serving non-English speakers, depending on whether this seems to be a larger demographic trend

### *System B:*

- Refer the library staff to online resources, though they may not have a comprehensive list
- Suggest other libraries or agencies to contact
- Try to work with other systems to develop continuing education offerings about the topic
- It is possible the library would not reach out to the system at all in this case, as they may not know that the system can provide them with assistance

### *Under the new model, for a library anywhere in the state:*

- Library could reach out to the primary consultant contact for the library or a consultant with whom they have a relationship
- The consultant would direct library staff to the portal, which would have resources to help with non-English speaking populations (including recorded webinars, language tips for library workers, web resources and a list of possible types of agencies/organizations to contact to learn more about the local population). The resources in the portal would be updated and reviewed for accurate information by one of the state consultants assigned to that subject area.
- The consultant would contact or refer the library to an inclusive services consultant who has specific expertise in serving non-English speaking communities for additional support, including specific help with connecting to community organizations; connecting with other libraries in the region, state or nation; sharing additional resources; acting as a sounding board if desired



- The consultant would also contact the continuing education consultants to determine if it would be helpful to have a series of continuing education offerings

## **Scenario 2**

A library recently hired an employee new to the public library environment.

### *System A:*

The system staff is available to:

- Help develop and/or review job description and implement or fine tune the hiring process and discuss important qualities and competencies
- Visit the library to meet the new employee and share information about youth services, public libraries and system services and resources
- Pair the new librarian with a mentor in the system based on interests, personality and needs.
- Visit the library to help troubleshoot challenges
- Add staff member to system list-servs and social media platforms to allow them to connect with peers in the region
- Be available for questions, concerns and conversations about the profession and the individual library staff member's specific situation
- Invite new staff members to continuing education workshops related to their subject area

### *System B:*

- The library may or may not contact the system
- If the system is contacted, the system may be able to share some general resources, add the new staff to a list-serv or social media platforms
- Invite new staff members to continuing education workshops, if the system has such events

### *Under the new model, for a library in either system:*

- Library director could reach out to the primary consultant contact for the library or a consultant with whom they have a relationship with before hiring
  - Will be directed to the portal for sample job descriptions, competencies, on-boarding programs and more
  - Will have the chance to get more direct help with hiring (viewing resumes, attending interviews) from a consultant
- Visit new library staff to share resources, take inventory of needs

- Be available to visit the library to troubleshoot challenges
- Pair the new librarian with a mentor in the state based on interests, personality and needs
- Add staff member to system list-servs and social media platforms to allow them to connect with peers in the region
- Be available for questions, concerns and conversations about the profession and the individual library staff member's specific situation
- Invite new staff members to continuing education workshops related to their subject area

### **Scenario 3**

A library is having an issue with the control of local library funds from the municipality. The library is seeking advice from a higher authority in preparation for an upcoming budget meeting with the municipality.

#### *System A:*

- System consultant will discuss the situation over the telephone or in person with library administration and board
- System consultant will refer library administration and board to relevant laws and court opinions
- System consultant will attend library board meeting and town board/city council meeting if necessary, or meet with representatives from the municipality

#### *System B:*

- The library may or may not contact the system
- System administrator and/or consultant may discuss the situation over the telephone or in person with library administration and board and offer advice

#### *Under the new model, for a library in either system:*

- Consultant will meet with library administration and board to offer advice and support
- Consultant may support the library administration in discussions with the municipality, both elected officials and municipal staff
- Connect staff with fellow library administrators that have successfully navigated these issues in the past

**Scenario 4**

A library director is tasked with creating a mission statement and strategic plan, and does not know where to start.

*System A:*

- System consultant will discuss options with director and board, including outside consultants and community resources, but also offering system services
- System consultant will refer library administration to the professional collection or existing online resources related to planning
- Possibly develop professional development opportunities (workshops, webinars) about the topic of planning or recommend opportunities that already exist (webinar recordings)
- Possibly develop a web-based planning guide

*System B:*

- Refer library to outside consultants or community resources who can help with planning
- Possibly refer to a professional collection or web resources

*Under the new model, for a library in either system:*

System consultant will develop and help implement a planning process, which might include:

- Creating a plan of action for what kinds of information needs to be collected and how to do so
- Assisting with conducting the research (facilitating focus groups, helping develop surveys, etc.)
- Work with library administration and staff to develop a plan based on research
- Provide consulting with suggestions for how to present the plan to stakeholders
- Provide consulting (perhaps with specialists) about how to implement this plan with staff
- Consult the portal for strategic plan examples shared by other libraries

**Scenario 5**

A library director is looking for continuing education training for its library staff on customer service.

### *System A:*

The library would contact the system consultant who works on continuing education and training. The system staff person would:

- Refer the library staff to online resources in this topic area
- Connect them to others systems in the region, state or country that have developed programs in this area
- Consider offering a workshop or series of workshops or other continuing education/professional development offerings

### *System B:*

- Refer them to others systems in the region, state or country that have developed programs in this area

### *Under the new model, for a library in either system:*

- Consult the portal for existing workshops and resources
- Use the portal to identify potential workshop speakers that could be hired. Information on the portal could include speaker names, contact information, fees and references.
- Seek survey information from the portal to see if other libraries are asking for the same kind of training

## IMPLEMENTATION RECOMMENDATIONS

The workgroup sees an incremental approach as the best way to implement this model.

- There is a lack of existing data for these services, especially consulting, that the workgroup was able to utilize to develop proposed staffing levels. During the first year of implementation, it will be important for the initial consultant teams to establish metrics to better help understand service needs, priorities and demand.
- Currently, it is not possible to predict what efficiencies may be gained and what will be needed to bring equity across the state.
  - Many of the current FTE consultants in the state are not dedicated consultants. Rather, a number are system directors that wear multiple hats to serve their member libraries.
  - From the survey sent out by the workgroup regarding consulting and continuing education services, a significant percentage of respondents indicated they prefer to receive services through options that do not include in-person consulting, whether via email or from online resources.

A focal outcome of this model is helping all library staff across the state reach a standard level of competencies. The workgroup considered the SRLAAW Report – Creating Effective Systems when discussing the staff levels necessary to achieve those standards. The standards set forth by SRLAAW included:

- Library Advancement and Awareness
- Collaborative Services
- Continuing Education
- Service to Special Populations
- Youth and Young Adult Services

The workgroup proposes the following first steps in the first year to implement the service model as follows:

1. Continuing Education
  - a. Form a team of consultants from current system staff that have continuing education as main focus of their positions
  - b. This could initially be established on a contractual level between systems to create access to the same level of continuing education services across the state.
2. Portal
  - a. Request that DPI funds a project to develop specifications for a platform that would serve as the portal and Learning Management System.
3. Consulting
  - a. Hire one consultant as the initial consulting manager.
  - b. This initial consulting manager's first two responsibilities would be:
    - i. Form existing system consultants into a formal team with a unified statewide approach to providing consulting services.
    - ii. Develop how existing consultants, in partnership with the continuing education team, begin to implement the assessment and evaluation of continuing education and consulting as described next.

## ASSESSMENT/EVALUATION OF RECOMMENDATIONS AS PART OF IMPLEMENTATION AND AFTER

During the first year of implementation, the CE and Consulting teams must define success and then determine how to measure it. The initial CE and consulting teams, led by the managers for each team, would be responsible for the following:

1. Development of strategic direction and priorities for CE and consulting work. This collective will need to firmly establish their mission and vision and create a strategic plan with priorities.
2. Determine metrics and how that data will be captured. They should consider:
  - a. Number of interactions/participants/consulting customers
    - i. Looking at portal traffic and phone, in-person and email assistance numbers, the team can gauge overall usage of the services offered.
    - ii. By looking at the home library of CE and consulting customers, maps can be made to see where services are being utilized and where further outreach or research needs to be conducted. This will be a key piece of data in determining if the new model is succeeding in making CE and consulting services more equitable across the state.
    - iii. By keeping track of the services being utilized, the management team can also determine if staffing and priorities are being resourced appropriately.
    - iv. The Learning Management System will be key to capturing this data and making it easy to access and use.
  - b. Evaluation/Satisfaction Surveys after services received. These surveys are critical in determining if the model is providing services as efficiently as it should and at the highest level of quality possible. Follow-up surveys will be critical in helping management determine:
    - i. If there is enough diversity within the available services (that all CE and consulting needs of libraries/staff are being met)
    - ii. If the services offered are high-quality
    - iii. If the services are easy to access (and that the portal is easy to navigate)
    - iv. If the services are being offered in a timely fashion
3. Along with determining metrics, throughout the first year, the team will need to establish benchmarks by investigating best practices, examining previous system data and looking at current year interactions.
4. After the first year, a consulting staff engagement survey should be done to gauge several factors:
  - a. Resources—Did staff feel they had the resources they needed to do their job? Do they feel capable of meeting libraries/staff demands?
  - b. Support—Did staff have the support they needed?
  - c. Efficiency—Are there areas of the model staff feel still need to be improved?
  - d. Engagement—Do staff feel engaged in their work?

As these first steps are achieved and a better understanding of need, priorities and available funding is gained, additional staff will need to be strategically hired according to the service need assessments and priorities that are identified in year one.

## GOVERNANCE RECOMMENDATIONS

The workgroup is not recommending any type of separate advisory board for these services. The workgroup feels accountability of the services is best achieved by assessment and evaluation by the libraries and people receiving these services.

While this mode is flexible enough to operate under the plan adopted by the Steering Committee, the workgroup believes it is important these service areas be represented in the administrative structure. This will ensure their voice is heard and the value the services provide to achieve equitable library services around the state is understood.

## ADMINISTRATION AND OTHER SERVICE SUPPORT NEEDS

The following is information for the Steering Committee for their administrative recommendation development process. In addition to common administrative support needs as detailed in the project manager report, the continuing education service will require specific administrative and technology support for its service model.

- Administrative Support
  - Event registration
  - Manage logistics for training sessions
- Technology support
  - Managing and coordinating the technical aspects of:
    - Online training
    - In-person training
    - Online portal
    - Learning Management System

APPENDIX A: 2017 CONSULTANT TO LIBRARY RATIOS  
 PLSR FUNDING AND COST STANDARDS SUBCOMMITTEE

System	Member libraries in 2017	How many FTE of individuals employed by the system were used to provide consulting services in 2017?	Number of libraries served by 1 FTE staff providing consulting services	How many FTE of individuals employed by the system were used to provide CE services in 2017?	Number of libraries served by 1 FTE staff providing CE services	How many FTE of individuals combined providing consulting and CE services in 2017?	Number of libraries served by 1 FTE staff providing consulting and CE services	
Arrowhead	7	1.86	3.76	0.17	41.18	2.03	<b>3.45</b>	<b>1 to 9</b>
Bridges	24	1.75	13.71	0.95	25.26	2.70	<b>8.89</b>	<b>1 to 9</b>
Indianhead	53	2.06	25.73	0.30	176.67	2.36	<b>22.46</b>	<b>20 to 29</b>
Kenosha County	2	0	0.00	0.00	0.00	0.00	<b>0.00</b>	<b>No Staff</b>
Lakeshores	15	0.35	42.86	0.00	0.00	0.35	<b>42.86</b>	<b>40 to 49</b>
Manitowoc Calumet	6	0.06	100.00	0.10	60.00	0.16	<b>37.50</b>	<b>30 to 39</b>
Milwaukee County	15	0.55	27.27	0.07	214.29	0.62	<b>24.19</b>	<b>20 to 29</b>
Monarch	31	1.4	22.14	0.10	310.00	1.50	<b>20.67</b>	<b>20 to 29</b>
Nicolet	14	1.40	10.00	0.50	28.00	1.90	<b>7.37</b>	<b>1 to 9</b>
Northern Waters	28	0.30	93.33	0.05	560.00	0.35	<b>80.00</b>	<b>50 and over</b>
Outagamie Waupaca	16	1.90	8.42	0.29	55.17	2.19	<b>7.31</b>	<b>1 to 9</b>
South Central	54	3.85	14.03	0.50	108.00	4.35	<b>12.41</b>	<b>10 to 19</b>



<b>System</b>	<b>Member libraries in 2017</b>	<b>How many FTE of individuals employed by the system were used to provide consulting services in 2017?</b>	<b>Number of libraries served by 1 FTE staff providing consulting services</b>	<b>How many FTE of individuals employed by the system were used to provide CE services in 2017?</b>	<b>Number of libraries served by 1 FTE staff providing CE services</b>	<b>How many FTE of individuals combined providing consulting and CE services in 2017?</b>	<b>Number of libraries served by 1 FTE staff providing consulting and CE services</b>	
<b>Southwest</b>	28	0.70	40.00	0.30	93.33	1.00	<b>28.00</b>	<b>20 to 29</b>
<b>Winding Rivers</b>	34	0.88	38.64	0.13	261.54	1.01	<b>33.66</b>	<b>30 to 39</b>
<b>Winnefox</b>	30	0.62	48.39	0.82	36.59	1.44	<b>20.83</b>	<b>20 to 29</b>
<b>Wisconsin Valley</b>	25	2.14	11.68	0.46	54.35	2.60	<b>9.62</b>	<b>1 to 9</b>
<b>Totals/Average</b>	382	19.82	19.27	4.74	80.59	24.56	15.55	
<b>Proposed</b>	382	47.00	8.13	6.00	63.67	53	7.21	

## APPENDIX B: CE AND CONSULTING RESEARCH LIST

### STATES CONTACTED

- California
  - <https://infopeople.org/>
- Connecticut Division of Library Development (<http://libguides.ctstatelibrary.org/dld/professional>)
- Delaware
  - <http://guides.lib.de.us/profdev>
  - <http://libraries.delaware.gov/educating/profdevelopment.shtml>
  - <http://guides.lib.de.us/projectplanning/professionaldevelopment>
- Georgia
  - <http://learning.georgialibraries.org/>
- Illinois
  - [http://www.cyberdriveillinois.com/departments/library/libraries/continuing\\_education.html](http://www.cyberdriveillinois.com/departments/library/libraries/continuing_education.html)
  - <http://www.cyberdriveillinois.com/departments/library/about/librarydivisions.html#LDG>
- Iowa Library Services
  - <http://www.statelibraryofiowa.org/ld/c-d/continuing-ed>
  - <http://www.statelibraryofiowa.org/ld/more>
- Michigan
  - <http://www.michigan.gov/libraryofmichigan/>
- Minnesota
  - <https://www.minitex.umn.edu/>
- Missouri
  - <http://www.sos.mo.gov/library/development/events.asp>
  - <http://www.sos.mo.gov/library/staff.asp#development>
- Montana ([http://libraries.msl.mt.gov/library\\_development/consulting](http://libraries.msl.mt.gov/library_development/consulting))
- New Mexico Library Development Bureau
- New York
  - <http://www.nysl.nysed.gov/libdev/lib/>
  - <http://www.nysl.nysed.gov/libdev/lib/publibs/3sa.htm>
  - <http://www.sals.edu/>
- North Carolina
  - <http://statelibrary.ncdcr.libguides.com/trainstation>
  - <http://statelibrary.ncdcr.gov/ld/staff.html>
- North Dakota
- Ohio State Library
  - <https://library.ohio.gov/services-for-libraries/strategic-planning/>
  - <https://library.ohio.gov/services-for-libraries/library-programs-development/>
  - NEO: <http://www.neotoday.org/>

- SWON: <http://swonlibraries.org/default.asp?>
- SERLS: <http://www.serls.org/>
- NORWELD: <http://norweld.org/>
- Ohio Library Council: <http://olc.org>
- Academic Library Assoc. of Ohio and Ohio Educational Library Media Association (OELMA): <http://oelma.org>
- OhioNET: <http://ohionet.org>
- Ohio Preservation Council (OPC): <http://opc.ohionet.org/opc Joomla/>
- Texas Continuing Education and Consulting (<https://www.tsl.texas.gov/ld/workshops/index.html>)
  - <https://www.tsl.texas.gov/ldn>
- Virginia
- Washington
  - <http://www.sos.wa.gov/library/libraries/grants/professional-development.aspx>
  - <http://www.sos.wa.gov/library/libraries/training/>
  - <http://www.sos.wa.gov/library/libraries/libDev/trustees.aspx>
  - <http://www.sos.wa.gov/library/libraries/All-Services.aspx>
- Wyoming State Library

## OTHER ORGANIZATIONS AND AGENCIES

- Aging and Disability Resource Center
- Birth to Three
- Cooperative Educational Service Areas (CESA)
  - [CESA 1](#)
  - [CESA 5](#)
- Library Strategies
- UW Extension, Local Government Center
- Wisconsin Library Service (WiLS)

## APPENDIX C: CE/CONSULTING SERVICES SURVEY

### PLSR Consulting and Continuing Education Services Survey

#### Welcome

Thank you for taking the time to complete this survey to help the Consulting and Continuing Education Workgroup.

The Consulting and Continuing Education Workgroup hopes to build a flexible, regionalized Public Library Service Model that provides equal access to consistent consulting services, innovative continuing education strategies and quality training methods and resources that support the needs of public libraries of all sizes throughout the state. This model is hoped to empower Wisconsin public libraries and staff through its focus on equity, development and support. You can learn more about this workgroup at <http://www.plsr.info/workgroups/consulting-and-continuing-education/>

The purpose of this survey is to help us plan for the best way to provide consulting and continuing education (CE) services to the library community by identifying common topics that are important to librarians and gaining an understanding for how librarians prefer to receive services. This information will help as we determine things like what the demands for in-person consulting or CE may be at a regional level, what services may be best provided remotely, and what kinds of services are most important to librarians.

The results of this survey will only be used by this workgroup for the purposes of developing service model recommendations.

You may skip any of the questions that you do not feel qualified or able to answer.

This survey should take you 10-15 minutes to complete.

## PLSR Consulting and Continuing Education Services Survey

### Questions about you

I work at or am part of (check all that apply):

- Public Library
- Public Library System
- Library Board
- Library System Board
  
- Academic Library
- K-12 Library
- State Agency
- Other (please specify)

My public library serves the following population size:

- >1,000
- 1,000 - 4,999
- 5,000 - 9,999
- 10,000 -14,999
- 15,000 - 19,999
- 20,000 - 29,999
- 30,000 - 39,999
- 40,0000 - 49,999
- 50,000 - 99,999
- 100,000 - 200,000
- 200,000+
- Not applicable

The region I am part of is best described as:

- Central
- Northeast
- Northwest
- Southeast
- Southwest
- Other (please specify)

# PLSR Consulting and Continuing Education Services Survey

## Service questions

Please indicate how important consulting and continuing education (CE services) are for the following **Services Improvement and Planning topics** (whether you use them yourself or not) using the following scale: not important, somewhat important, very important, get this service from another source; e.g., municipality.

**This is part one of a two-part question.**

We get this service from

	Very important	Somewhat important	Not important	another source (ex. Municipality)
Youth Services (preschool)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Youth Services (school age)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Youth Services (teens)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Inclusive Services: Reducing barriers and improving services for people for whom library use might be difficult.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Community Engagement	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Technology - services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Collection Management	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Developing Partnerships	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reference Services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Public Programs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Technical Services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Other (please specify) or comments

Please indicate how important consulting and continuing education (CE) services are for the following **General Topics** (whether you use them yourself or not) using the following scale: not important, somewhat important, very important, get this service from another source; e.g., municipality.

**This is part two of a two-part question**

We get this from another

	Very important	Somewhat important	Not important	source (ex. Municipality)
Library board issues/training	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Personnel issues/human resources	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Building projects/space planning	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Chapter 43	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Grant writing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Facilitating connections with other librarians	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Safety and security	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Policy development	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
ADA compliance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Technology infrastructure	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Budgeting	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Marketing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Advocacy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Data and Statistics	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Other (please specify) or Comments



How do you prefer to receive services in the following scenarios (check all that apply):

Note: **online portal** contains curated information and resources for you to search.

**This is part one of a two-part question.**

	Phone or email	Online continuing consulting	in-person continuing consulting	education	education
Our Spanish-speaking population is increasing and we need help providing service.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We need to update our collection development policy.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our front-line staff need help handling unruly teens after school.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A family that seems to be homeless is in the library a lot--how do we help?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We need to hire a new library director.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Our circulation supervisor is rude to library users. How can I correct this behavior?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We have a new director or other key staff members who has never worked in a library.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments

How do you prefer to receive services in the following scenarios (check all that apply):

Note: **online portal** contains curated information and resources for you to search.

**This is part two of a two-part question.**

	Phone or email	Online continuing consulting	In-person continuing consulting	education	education
Everyone got off-brand e-readers for Christmas. How can we help them?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We want to create a mission statement and strategic plan but don't know where to start.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We want to start a digitization project of some historic local newspapers.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We want to build a digital inclusion plan and need help.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We need help planning our children's space in our new library.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We need a professional development policy for our staff.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We need a refresher on Every Child Ready to Read.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
How should we get community feedback on a new service we are offering?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments

Please indicate the importance of each factor below in determining your ability or willingness to attend an in-person workshop.

	Very Important	Important	Not at all Important	Unsure
Location of the workshop	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Topic	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Speaker	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Length of the workshop	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Weather concerns or road conditions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ability to find desk or program coverage	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
What else is going on that week	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comments

When thinking about your schedule, what length of time is the most convenient for an in-person workshop?

- 1-2 hours
- Half day
- Full day
- Other (please specify)

What is the maximum distance (one way) you are willing to travel to attend an in-person continuing education (CE) program?

- 50 miles
- 75 miles
- 100 miles
- 150 miles
- Comments

Do you have anything else that you would like to share with the Consulting and CE workgroup?

## APPENDIX D: CE/CONSULTING DETAILED LIST OF SERVICES

Detailed list of services and topics covered by consultants and portal

### CONTINUING EDUCATION CONSULTANTS

Coordinate and provide both face-to-face, online CE opportunities and CE consultation with libraries. This includes:

- Plans and produces programming that can be accessed online
  - Self-paced online
  - Group online
- Plans and produces programming that is attended in person
- Works with other consultants, subject specialists, organizations and agencies to produce content
- Serves as the face of CE for a geographic region
- Stays current with national trends in librarianship and CE
- Coordinates with local library training staff to produce and promote complementary content within their geographic region
- Serves as a resource for library staff in providing continuing education at a local level
  - In-service or staff development day or workshops
- May serve as workshop presenter or trainer
- Marketing of CE opportunities
- Manage CE content for the portal
  - Provides and organizes content
  - Creates and manages evaluations, surveys, reports, etc.
  - Collects and analyzes statistics
  - Provides a current statewide CE calendar
- Manage Learning Management System (LMS)
  - Deliver online learning
  - Track progress
  - Manage record keeping
- Certification Validator
  - Serves as a validator for public library director certifications

### RESOURCES AND SERVICES AVAILABLE VIA THE ONLINE PORTAL

- Learning Management System
- Calendar of events

- Registration
- Ideas submission
- Sign-up for email notifications
- Links to other CE possibilities
- Postings of handouts, recordings and resources
- Evaluations and evaluation results
- Platform for discussion or follow-up opportunities
- Consultants list/references
- Certification requirements/forms
  - Tracking/submitting of CE credit/participation
- Ability to password protect or limit access to some information to those with accounts

## SERVICE CONSULTANTS

Services consulting will be available via email, phone or in-person with each situation directing the method provided.

## YOUTH (0-18 YEARS) CONSULTING

- New youth services librarian orientation/meetings
- Child and teen development
- Managing challenging behavior
- Supporting healthy families
- Early literacy best practices
- Connecting youth services librarians with each other (fostering mentorships, creating and supporting opportunities to network, share ideas and discuss challenges)
- Helping youth services librarians make connections with community partners (schools, public health, Birth to Three, Family Resource Centers, parent support, etc.)
- Programming
- Preparing for and dealing with challenges to materials
- Evaluating materials and collections
- Advocacy/education about youth services issues to library administration
- Planning and evaluation of youth services
- Trends, issues and awareness (statewide, nationally and outside the library world)

## ADULT SERVICES

- New librarian orientation/meetings
- Programming for adults, including programs for older adults and aging populations

- Helping make connections/partnerships with community partners (businesses, service clubs, service providers, state and national initiatives)
- Connecting adult services librarians with each other (fostering mentorships, creating and supporting opportunities to network, share ideas and discuss challenges)
- Evaluating materials and collections
- Managing challenging behavior
- Trends, issues and awareness (statewide, nationally and outside the library world)
- Community engagement
- Support for emerging technologies
- Planning and evaluation of adult services

#### GENERAL LIBRARY SERVICES AND PROGRAMMING

- Collections
- Cataloging
- Customer service
- Multi-type and other partnerships

#### INCLUSIVE SERVICES

- Community engagement (advancing community goals)
- Community partnerships
- Outreach
- Security issues
- Social services
- Racial justice; social, gender, disability and class equity
- Support for emerging technologies (adaptive technologies)
- Trends, issues and awareness (perspective beyond Wisconsin libraries and libraries in general)
- Tribal libraries
- User experience services (staff relations, customer service, dignity)
- Evaluating materials and collections
- Managing challenging behavior
- Planning and evaluation of services

#### MARKETING AND ADVOCACY

- Branding and logos
- Assisting libraries to develop capacity in design skills
- Designing larger promotional materials (for special events)

- Regional marketing campaigns
- Social media strategies
- Developing marketing plans
- Developing relationships with media outlets and creating effective press releases/media coverage
- Developing and maintaining relationships with elected officials
- Advocating for library programs and services with local, state and national officials

#### RESOURCES AND SERVICES AVAILABLE VIA THE ONLINE PORTAL

- Direct grants to libraries (CE, collection, summer library, WLA)
- Loanable technology and equipment—loan system
- Graphic design tools and information
- Information and resources related to specific consulting areas

#### ORGANIZATION CONSULTANTS

Services consulting will be available via email, phone or in-person with each situation directing the method provided.

#### ADMINISTRATIVE

- Annual report—train, answer questions, review and facilitate corrections
- Board/municipal relations—explain Chapter 43 as it relates to authority and responsibility of library boards, and help library boards if issue arises with municipal boards (for example, disagreements over unspent library funds, the authority of the board to hold donated funds separately or authority over how budgeted funds are spent)
- Advocacy—promote the importance of library advocacy and create tools and resources libraries can use to encourage local residents to become library advocates.
- Library governance and administration—annual calculation of county-appointed board members
- Library trustee training and support—work with library directors to provide information and resources to help train library trustees and then help them do their jobs more effectively.
- Library agreements and contracts—support library directors and boards with information and resources so they are protected if they enter into agreements and/or contracts.
- New library director orientation/training—design and implement an orientation and training program for new directors. This involves other consultants, technology, ILS,



delivery, etc. All facets of library service are covered, as are Chapter 43 and other pertinent parts of state and federal law.

- Personnel and human resources—provide library directors with information and resources that support them in their day-to-day responsibilities supervising staff. This will include information about employee evaluations, writing job descriptions, setting employee compensation, answer questions about discipline issues and other related topics.
- Policies, procedures, standards, compliance—work with library directors and boards to create local policies and procedures that keep the library in compliance with state, system and county standards and the director and boards in compliance with requirements about certification and membership.
- RFP/bid process—help library directors and boards manage the RFT/bid process and work collaboratively with the facilities consultants when building projects are underway.
- Legal questions—answer legal questions for library directors and boards related to Chapter 43 and serve as the liaison with the Division for Libraries and Technology on legal matters.
- Library finance (budget, county payments, fundraising, grants, foundations)—serve as an information resource for directors and library boards, assist with filing adjacent county reimbursement requests and prepare information for exempting from the county library tax.
- Vendor Liaison/Contracts/Cooperative purchasing—help libraries create requests for proposal (RFP) and perform evaluations of services provided.
- Tribal libraries—provide documentation and guidance in dealing with these special libraries, their unique needs, statutory requirements and their interactions with other libraries.
- Joint libraries—provide documentation and guidance in dealing with these special libraries, their unique needs and statutory requirements.

## DATA

- Data collection, analysis and evaluation (statewide, by county, by library)—using data from the ILS, U.S. Census, annual report and other sources, create data dashboards for general public use.
- Advocacy—work with individual libraries to analyze and present data that helps tell the library's story in the community.
- Annual report—consult on data collection protocols and efforts to help libraries comply with the statutory requirement to file an annual report within 60 days of the end of the calendar year.
- Leverage data to assist in the strategic planning process.

## PLANNING

- Development (volunteers, friends, foundation)—provide guidance about the roles and relationships of the library board, director and library staff to those of volunteers, friends and foundations.
- Advocacy—support administrative and data consultants in working with library directors and board to enhance local advocacy efforts.
- Strategic, system, technology, county, consortium and sustainability planning—prepare detailed information about the process, participants, timelines, etc. to help facilitate plan development and work with directors and boards to train them to manage the process. Also, create resource lists of consultants who are available for hire if the board and director do not want to manage their own process.
- Community building—help library directors and boards find ways to work more collaboratively with other local agencies, organizations and civic groups to support community mission and goals.

## RESOURCES AND SERVICES AVAILABLE VIA THE ONLINE PORTAL

- Legal FAQ
- Annual report FAQ and/or instructions
- New director and board member orientation and training resources
- Sample library policies
- Data dashboards
- Advocacy resources
- Bid process/sample documents

## FACILITIES CONSULTANTS

- Assistance with program statements—successful building projects require the development of a program statement that identifies and explains the need for a new or expanded space. The goal will be to provide assistance with these documents, but some of the work may need to be handled by architects and/or paid consultants if the workload at any given time becomes unmanageable. These are time-consuming tasks, so only a certain number can be managed by any one person at a time.
- Guidance on ADA and accessibility issues—compliance with the requirements of the Americans with Disabilities act is central to ensuring that a public library is accessible to all residents of the community. Interpreting the requirements, however, can be challenging so assistance is often required.

- Guidance on security issues—building security is a concern for all libraries, so information about what systems are available, and how they can be implemented, is crucial. On top of that are patron privacy concerns that may arise from certain systems, so accurate consulting is vital.
- Space needs assessment/current space evaluation/space plan layouts—helping libraries plan for a new building, an addition to the existing structure or a reconfiguration of existing space to allow for more efficient use, these are vital services from which all libraries can benefit.
- Assistance with RFP/bid process—most library boards and directors have little or no experience with building projects, so having someone in their corner to help ensure the library’s interests are addressed is vital. Architects or consultants can provide these services, but using these experts can dramatically increase the cost of a building project, reducing the dollars available for construction.
- Furniture and finishes selection—this is one area that board and directors may be more comfortable with, but even so, it is important to make the correct selections to get the most value for the dollars spent. Purchasing what is least expensive may not result in the greatest value because the product selected may not hold up to the heavy use in a library.
- Guidance on obtaining and maintaining environmental certifications/best practices regarding environmental issues—many building projects today aim to be as environmentally responsible as possible. In addition, different municipalities are incorporating principles of sustainability into their facilities management processes. Guidance on this would be incredibly helpful and time-saving for library staff.
- Guidance on developing meeting room policies/pricing—for those libraries that may be interested in assessing their meeting room policies or making access available by renting out space, having a consultant on hand who could provide basic guidance would be helpful.

#### RESOURCES AND SERVICES AVAILABLE VIA THE ONLINE PORTAL

- Legal FAQ
- Providing contacts for fundraising, feasibility studies and capacity building
- Building maintenance (HVAC, roofing, security, cleaning/maintenance, replacement)
- Making connections between the library and ILS/Technology staff for project planning
- Recent projects for remodels or builds
- Guidance on architectural firms

## APPENDIX E: LEARNING MANAGEMENT SYSTEM SPECIFICATIONS

### PRICING FACTORS: CLOUD VS. SELF-HOSTED

#### SELF-HOSTED

- Free (open software)
  - minimal support
  - increased demand for internal IT support and costs
- Perpetual License (one-time cost after which usage is free)
  - More common with on-premise solutions and installed on local servers
  - Good for large and stable number of learners
  - Lengthy period = risk of losing out in rapid technical advancements
    - Other costs (ongoing) to consider: Setup and hosting, configuration, maintenance, additional licenses, support, upgrades
- Periodic License (flat fee/month or year to use the software)
  - Covers users and courses you like
  - Up-front costs lower than a perpetual license
  - Flexibility – can switch LMS when needed
  - Other costs to consider:
    - Same as perpetual license (self-hosting + ongoing costs)
    - Setup fee

#### CLOUD-BASED

- More common, allows access via web browser
- Pricing models: setup fee + monthly/quarterly/annual fee (subscription)
- LMS vendor provides the hosting
- Vendor's costs affected by usage
  - Models:
    - Pay-per-user: Fees calculated per users or range of users (Note: Definition of "user" may vary (registered, active, inactive...))
    - Pay-per-use: Fee per-use definition varies (per course, module, enrollment...)
    - License Fee: a one-time, upfront fee to access software or flat fee to access for a specified period

#### OTHER CONSIDERATIONS:

- Platform compatibility:
  - Computer use: Mac OS, Windows, Linux

- Mobile devices: Android, Apple devices, Chromebooks, etc.
- Being able to record other learning not listed in the LMS
  - Examples: Gale Courses, MOOCs, Lynda.com, CVMIC, online tutorials (i.e. LearningExpress Library), university courses (in-state, out-of-state, courses in other fields than library), etc.

## APPENDIX F: CE/CONSULTING WORKGROUP BUDGET SUMMARY

<b>Category of Expense</b>	<b>How it was determined</b>	<b>Amount</b>
Annual Staff Salaries	Managers: Average of existing system director positions (\$82,450)  Consultants: Average of existing system consultant positions (\$59,000)  Includes 28% of salary as benefits.	\$4,122,624
Program, Workshops and Meeting Expenses	Based on current expenditures in the 16 systems using the 2017 budgeted amounts gathered by the PLSR Funding and Cost Standards Subcommittee	\$223,824
Member Grants and Professional Dev. Support	Using information of the current expenditures in the 16 systems from the 2017 budgeted amounts gathered by the PLSR Funding and Cost Standards Subcommittee, the workgroup decided to allocate an average of \$200 per public library in the state for this.	\$76,200
Professional Collection	Current system expenditures	\$20,000
Learning Management System Platform		TBD

## APPENDIX G: CE/CONSULTING STAFF SALARIES CALCULATIONS

<b>CE-Consulting Job Title</b>	<b>FTE Salary</b>	<b>System Directors</b>	<b>FTE Salary</b>
Consultant Services Coordinator	\$79,494		\$117,653
CE and Multitype Consultant	\$70,447		\$102,000
Web Services Consultant	\$70,447		\$101,372
Youth Services and Outreach Consultant	\$70,447		\$95,077
Building Consultant	\$70,447		\$86,694
Coordinator of Library Development	\$68,307		\$84,332
Technical Services Consultant	\$67,435		\$77,580
Continuing Education/Training Librarian	\$60,965		\$76,006
Public Library Consultant	\$60,403		\$75,980
CE/Information Coordinator	\$59,185		\$75,606
Library Consultant	\$58,056		\$69,000
Resource Consultant	\$57,460		\$67,424
Coordinator of Youth and Special Needs	\$57,158		\$65,875
Lib Dev/Yth Svcs Coord	\$55,432		\$59,702
Marketing and Communications Liaison	\$53,019	<b>AVERAGE</b>	<b>\$82,450</b>
Public Information Coordinator	\$44,596		
Communications Coordinator	\$44,512		
Graphic Arts Specialist	\$34,797		
Youth and Special Needs	\$28,048		
<b>AVERAGE</b>	<b>\$58,456</b>		

	<b>Consultants</b>	<b>Managers</b>
Salary per FTE	\$59,000	\$82,450
Total FTE	48	4
<b>Total Salary</b>	<b>\$2,891,000</b>	<b>\$329,800</b>