WISCONSIN

PLSR
PUBLIC LIBRARY SYSTEM REDESIGN PROJECT

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

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OVERVIEW OF PROCESS

Transparency, inclusiveness and community leadership have been the bedrocks of the Public Library System Redesign process. As the fundamental services that libraries depend on for their daily operations have been reconsidered, libraries and Library System staff were the leading voices in the conversations, as members of the Steering Committee, workgroups, the survey panel, review panels, and as providers of valuable feedback to the workgroups, Steering Committee and Project Manager.

The following core principles, adopted by the Steering Committee at the December 2015 meeting, informed the process from start to finish:

- Communication is critical for the success of the process.
- The process relies on openness and trust from all participants.
- Information and data should be the bedrock of the process.
- Outside expertise will add credibility and weight to the outcome.
- The process will be used grow skills needed to maintain flexible and community-driven service into the future.

Additionally, equity was, from the start, an important reason for and desired outcome of the PLSR process. The desired service outcomes developed by each workgroup clearly showed a focus on providing equitable service. Later in the process, the workgroups were asked to consider what "equity" means in a given service area and how it could be achieved. As equity emerged as a lens for the entire process, the Steering Committee instructed workgroups in their work and recommendations to:

- Illustrate existing inequities through data and stories
- Contextualize the inequities for those that may not see the them regularly
- Identify barriers
- Create processes to overcome the barriers
- Focus equity on the citizens of Wisconsin and not the libraries or the Systems

These principles were the touchstones for the project manager at every step of the process.

PROCESS BACKGROUND

Wisconsin's library system law, providing funding for coordinated regional library services, officially went into effect in 1971 when Senate Bill 47 was signed into law (1971 Act 152). The creation of public library systems fostered the establishment of a strong network of resource

sharing and mutually beneficial interdependence. The actual creation and development of public library systems in Wisconsin was a voluntary and gradual process. No county or public library is required to be a member of a library system; yet, as of this writing, all of Wisconsin's 72 counties and more than 380 public libraries are library system members. Wisconsin's 16 public library systems developed in distinct ways in response to the needs of their member libraries and area residents.

While changes in society, resources and technologies have created new demands and opportunities for systems, the services required of them, as well as how some services are provided, are still relatively unchanged from the original law. Over time, issues of service duplication and inequity have developed. Changes in service needs of the libraries and opportunities for new methods of service delivery have also developed, providing both challenges and potential changes that could improve services.

The library community has recognized the need to update what is required of library systems as well as to redesign the services in a manner that is more efficient and effective. Prior to 2013, there were a number of studies and reports commissioned by system and library directors to reconsider the system model. In 2013, System and Resource Library Administrators' Association of Wisconsin (SRLAAW) "undertook a multi-part process to examine how public library systems can remain effective in meeting member library needs in the future, including the possibility of reconfiguring systems."[1]

The SRLAAW report focused on services and standards but also charged the Department of Public Instruction (DPI) with completing a study to understand what is the right-sized system. The Lean work group, led by a Lean Consultant hired by DPI, completed this process and rather than looking for a right number of systems, "the work group studied the issue from a lean practices perspective considering capacity, resource and demand analysis to imagine new models to deliver the different services currently provided by systems."[2] The analysis had shifted from simply one of consolidation to that of efficient and effective service delivery. Acknowledging their limited expertise and time, the Lean work group recommended service experts be brought together to design the most effective and efficient models for the different services systems, focusing first on service and then the best administrative support structure for those services.

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[1] SRLAAW, Creating More Effective Library Systems, http://srlaaw.org/reports/2013Process, last accessed 2/21/2018.
[2] DPI LEAN System Study Work Group Recommendations, 9/5/2014, https://dpi.wi.gov/sites/default/files/imce/pld/pdf/LSSWG_recommendations.pdf, last accessed 2/26/2018.

At the same time as the Lean work group was meeting, the Council on Library and Network Development (COLAND) met with State Superintendent Dr. Evers and discussed concern about the sustainability of systems. Out of this conversation, COLAND formed a committee to develop a vision for library systems in the 21st century. This resulted in a roadmap "for the first two years of a process intended to lead change at the local and regional level to maximize organizational resources and state funding to deliver the highest quality library services to Wisconsin residents for the tax dollars provided."[3] COLAND also endorsed a roadmap for DPI to form a steering committee to lead a public library system design process with library service experts and users in service workgroups.

It was at this point that the State Superintendent appointed the Public Library System Redesign Steering Committee. The Committee put out a Request for Proposals for individuals or organizations to provide project management services for the workgroup process. After reviewing the proposals, the Steering Committee hired WiLS to act as the project manager.

COMMUNITY-LED VISION, COMMUNITY-LED PROCESS

To begin their work together, the Steering Committee and WiLS developed a set of core principles for the process. The Steering Committee and project manager understood that the entire process must belong to the community: it must be participatory, transparent and done with the recognition that, while some in the community may not want to participate, most want to continue to improve our invaluable library service to residents of the state. As such, the process utilized community members in leadership roles, as workgroup members, as sources of data and information, and as reviewers of the work performed.

In order to develop new models of service, the project manager formed workgroups of community members. The 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. The leads and facilitators worked closely with the project manager and communicated progress and concerns from the workgroup, assisted with planning meetings and helped determine process for the workgroup. Facilitators were responsible for running the meetings and providing facilitation to make sure all voices were heard at the meetings.

In January 2016, the project manager put out an open call to the Wisconsin library community requesting applications for workgroup members to participate as either experts or service

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[3] COLAND, Strategic Vision for Library Systems in the 21st Century, 1/8/2015, http://www.plsr.info/wp-content/uploads/2016/04/Future-of-system-services-road-map-1-8-15-FINAL.pdf, last accessed 2/26/2018.

users/stakeholders. In March 2016, the facilitators, leads and liaisons to each workgroup reviewed the applications to determine the composition of the workgroups.

Each leadership team identified what expertise and different viewpoints they wanted represented. They reviewed all of the applications for their workgroup and tried to create a team that met their ideal representation, focusing on each applicant's experience as an expert and/or user of the service area and their ability to work with the team through the process. Workgroup membership included system staff, public library staff, academic librarians and K-12 librarians.

Initially, there were nine workgroups, with two sets combining when it became apparent their models had similarities and dependencies. The workgroups, each ultimately responsible for a recommendation report in their service area, were:

- **Chapter 43**: tasked with reviewing Chapter 43, the Wisconsin State law that provides for public library systems and libraries, and making recommendations for changes in conjunction with other workgroup recommendations.
- **Collections:** initially the Electronic Resources workgroup, they were charged with recommending how to continue and expand the coordination, purchasing, contracting and management of electronic resources for Wisconsin public libraries and crafting recommendations for the most efficient and effective collaborative methods to collect, create, and make accessible, throughout the state, digital content.
- **Continuing Education and Consulting:** Initially two workgroups, these service areas merged at the end of Phase II. The goal of the workgroup was to create a flexible 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.
- **Delivery:** This workgroup analyzed and explored methods to offer the most efficient and cost-effective delivery of physical materials to and from public libraries in Wisconsin.
- **ILL / ILS Discovery:** The ILL and ILS Discovery workgroup examined the resource sharing ecosystem of interlibrary loan (ILL), integrated library system (ILS) and discovery services, and developed new service models to resource sharing throughout the state. Initially two separate workgroups, one for ILL and one for ILS Discovery, the two workgroups combined to develop an interoperable model of service.
- **Resource Libraries:** This group studied and made recommendations related to how System resource libraries can best serve the needs of Wisconsin library systems, public libraries and the patrons they serve.

- **Technology:** The workgroup explored, analyzed and made recommendations on technology services for public libraries, including new technology, technology infrastructure and local technology support**.**

The recommendations from each of these workgroups are included in this report, with the exception of Chapter 43. The decision was made that this workgroup will provide expertise as the Steering Committee begins its work to develop overall structure recommendations and will deliver its recommendations as part of that process. This workgroup has provided a report detailing their work to date and their next steps.

PROJECT MANAGER ROLE

The project manager was responsible for helping the workgroups manage their workloads and the process so that they could ultimately present the Steering Committee with thoughtful, careful and feasible recommendations. Additionally, the project manager reported progress, communicated workgroup needs to the Steering Committee and supported the Steering Committee as they guided the entire process. Throughout and at specific times, the project manager was responsible for the following activities and outcomes:

- **Workgroup Management:** Worked with leadership to guide workgroups toward fulfillment of project plans. Identified experts as needed. Coordinated data and information collection and distribution among the workgroups. Monitored progress of workgroups and facilitated information exchange among workgroups. Coordinated review panel participation as needed. Assisted with coordination of meeting logistics. Coordinated communication of workgroup activities, including collecting agendas, notes and recordings and reporting workgroup activities to community. Maintained the timeline and work plans for groups to ensure timely completion of recommendations.
- **Workgroup Expertise and Participation:** Provided expertise to workgroups as appropriate. Participated in all workgroup meetings.
- **Steering Committee:** Coordinated regular meetings and provided the Committee with regular project updates. Coordinated the work of the Chapter 43 workgroup and Steering Subcommittees to support data and information gathering needs for Steering Committee. Coordinated the process for the Steering Committee to be prepared to develop funding, governance and administrative recommendations. Coordinated and attended Steering Committee meetings. Maintained records for Steering Committee.
- **Communications:** Developed and reviewed communication content and regularly disseminated communications through a communication liaison network and statewide communication channels, including maintaining project website and blog. Reviewed and enhanced the communications plan as needed. With the Steering Committee, created

and implemented monthly online Q&A sessions to address big picture issues and questions from the community. Developed toolkits for communicating with library and library system boards and staff. Monitored concerns and potential issues and communicated appropriately and proactively to minimize issues. Provided process updates and presentations as needed to groups including, but not limited to, DPI Department of Libraries and Technology (DLT), DPI Public Library Development (PLD), DPI Resources for Libraries and Lifelong Learning (RL&LL) teams, COLAND, SRLAAW, Library Development and Legislation Committee (LD&L) and the DPI Cabinet. Coordinated events at WAPL and WLA conferences, regional tour for the Steering Committee, and other state and regional activities to communicate information and gather feedback. Responded to questions and other community needs for information and process assurances.

- **Records Management:** Continued management of records according to established plan. In consultation with DPI records management experts, developed retention schedule for documents created during the PLSR process.

PLSR WORKGROUP PHASES

The Institute of Museum and Library Services (IMLS) through the Library Services and Technology Act provided funding for the project manager contract and other expenses associated with executing this project. The Indianhead Federated Library System served as fiscal agent for the project.

PHASE I

November 17, 2015 through April 30, 2016. The objectives reached in this phase included implementation of a communication plan, development of a document management system, establishment of principles and goals for process, compilation of data and information for workgroups, including coordination of a budget and cost analysis with experts and collection of out-of-state information, population of workgroup leadership and members, delivery of a project orientation to workgroup leadership and development of workgroup project plans.

PHASE II

May 1, 2016 through March 31, 2017. This phase focused on the development of strong frameworks for workgroup efforts and data and information gathering. Activities included creation of desired outcomes and vision for service models to be used to guide service model development, in-state and out-of-state data and information gathering and assessment, bigger picture design of workgroup service and model sharing for feedback at WLA 2016 and on the project website.

As workgroup models took shape, it became clear that certain areas in models overlapped or depended on other workgroup models. It was during this phase that Topic Teams, made up of existing members of workgroups, met in order to make decisions related to topics that impacted multiple workgroups. The four Topic Teams were Defining the Help Center, Refining and Defining Consulting and Continuing Education, Regions and Resource Sharing.

Members of the topic teams presented their decisions at WAPL 2017 (See full recommendations in Appendix A through E)

PHASE III
April 1, 2017 through March 31, 2018. This phase saw workgroups fill in the details of their service models using community feedback and responses from experts on review panels. Budgets, staffing models, implementation and governance recommendations were created. Workgroups shared their models at WLA 2017 and on the project website.

In this phase, the Steering Committee determined a process to develop its recommendations regarding the administrative, governance and funding structure to support service model recommendations developed by project workgroups. This process will include Core Recommendation Collaborators and Model Development Summit Participants, both of which are made up of participants from within and outside the Wisconsin public library community with skills and experiences that will help the Steering Committee craft the best recommendations for the citizens of Wisconsin. The Steering Committee contracted with Russell Consulting Inc. to provide the facilitation for this process. The role of WiLS will change to administrative project support during this process.

The submission of the workgroup recommendations and this report to the Steering Committee marks the end of this phase.

A PROCESS OF CHANGE, A CHANGING PROCESS

At the start of each phase of the PLSR process, the project manager mapped out expected activities and outcomes. Many of those activities occurred, from the creation of an effective communication plan to maintaining a transparent and open process. However, based on circumstances and available resources, the roadmap changed several times. The PLSR process was iterative; we planned, we confronted reality, we responded. Like the Lean process that helped form PLSR, the project manager viewed process improvement as continuous.

Many of these changes were based on the progress of the work and what seemed likely to deliver the best outcome for the process, the Steering Committee and the community. For

example, a scheduled retreat in February 2018 was initially planned to include all workgroup members. As the retreat approached, the process seemed better served by having a smaller group in order to facilitate more in-depth conversations around the service areas. In another example, planned community regional meetings were postponed in order for the community to have more information on which to base their feedback. Overall, the timeline expanded for the project. With the guidance of DPI, more time was introduced into the process for the Steering Committee to develop their recommendations

Other changes were more broad in scope:

- One of the core principles of the process was that *information and data should be the bedrock of the process* and largely, the process met this principle. However, standard, consistent data was difficult to come by, especially solid budget and staff numbers. In many cases, data either did not exist, was self-reported, or was not comparable due to how data is reported through standardized collections like the annual report library systems submit to DPI each year. For example, although budgetary information exists in annual report data, often, administrative expenses are attributed to services. This made it very difficult to develop current service costs to use as comparisons for the workgroup recommendations. The Funding and Cost Standards Subcommittee of the Steering Committee made significant progress towards providing some data around current service costs. An additional benefit of the process is that progress was made toward standardizing the reporting of system budgetary data, largely thanks to the business managers in the systems.
- The project manager expected to rely on more outside expertise in the development of service models. Each call for participation attempted to solicit voices from outside of the public library world to challenge assumptions, share expertise and ask questions. While some workgroup members and review panel members were from academic or K12 libraries, the business world, or government officials, the vast majority of process participants were directly part of the public library community.
- From the start, the project manager envisioned that the process would include identifying, employing and developing long-term implementation recommendations based upon experience and information gathered during pilot projects. However, the implementation of pilots was problematic for a variety of reasons. For some workgroups, it would have been difficult and expensive to pilot services. The Steering Committee was also concerned that pilots had the potential to increase the bias toward the model: once the time and money has been invested in piloting, there may be a stronger desire to make that model work. Additionally, there was a concern that a model might work in a pilot but may not scale to a larger project. Finally, there simply

was not time for workgroups to develop recommendations and administer pilots in a meaningful way. For many workgroups, the proposed implementation plans include a scaling-up of services that will allow for assessment of the service models as the service develops. This phased-in approach that many workgroups took toward implementation may serve the same purpose as pilots could have.

A challenge throughout the process was deciding if the Steering Committee should develop their recommendations for administrative and governance structure while the workgroups were developing their service recommendations or if they should wait for those recommendations before beginning their own work. Both approaches had their benefits. While many workgroups wanted to understand the overall structure in order to develop their service models, the Steering Committee decided to wait for the workgroup model recommendations. The premise of the PLSR process was that it should be service driven and that workgroups should develop their models without restrictions.

INFORMATION AND DATA GATHERING

The process has included significant information gathering, from within the state and beyond, to gain a better understanding of what is true today and what is possible in the future. From survey results and annual report data to interviews with practitioners in the state and from outside the borders, workgroups, the Steering Committee and project manager made every attempt to bring in information and ideas to help workgroups use data to develop service models that met the needs and expectations of the library community.

Examples of information and data collected include:

Out-of-State data
- Several individuals, state librarians or others responsible for state library services were asked to complete a short survey describing how collaborative services are provided in their state, by service area (Continuing Education, Consulting, Delivery, Electronic Resources, ILL, ILS and Technology). The following states responded to all or parts of the survey: New Mexico, Texas, Wyoming, Connecticut, Ohio, Iowa, Illinois, North Carolina, Minnesota, Montana, Virginia, Delaware, North Dakota, Washington and Missouri.
- Workgroups had several one-hour long webinars with other states to discuss collaborative library services. The following states participated in webinars, each of which was recorded and timestamped by topic and is available on the PLSR site: Colorado, Illinois, Massachusetts, Michigan, Minnesota, Ohio, Texas and Wyoming
- Other reports and resources were gathered from other states (each are linked on the PLSR website):

- o Requirements for Directors and other staff for library to receive state aid in Michigan
- o Overlay and Fulfillment Project — Reaching Across Illinois Library System (RAILS)

Surveys of the Public Library Systems
- System Importance Satisfaction from Libraries: a survey that asked member libraries to rate the importance of and satisfaction with system services. Many of the surveys, done in the context of strategic planning, pre-date the start of the PLSR process. Others were completed as a comparison point for PLSR.
- PLSR System Services Survey: a comprehensive survey that asked systems to describe how services are provided to their member libraries.
- PLSR Library System Survey - SRLAAW Follow-up: a survey of systems after the April 2017 SRLAAW meeting that asked systems to share what they are doing well and what services to libraries could be improved.

Surveys via the PLSR Survey Panel (defined in the collaborators section of this report)
- Defining the Help Center Topic Team Survey
- Resource Sharing Topic Team Survey
- Consulting and Continuing Education Workgroup Survey

Other surveys
- Resource Libraries Workgroup Survey of Public Library Staff
- System Administration Duties Survey
- System/County Relationship Survey

Other resources
- Governor's Commission on Government Reform, Efficiency, and Performance

Individual workgroups gathered a variety of data and information as they developed and refined their recommendations, ranging from informal discussions with notes to formal reports and data.

See the resources consulted page on the PLSR website (http://www.plsr.info/workgroups/resourcesconsulted) for more information.

COMMUNICATION POINTS IN THE PROCESS

The success of the process was contingent on appropriate and frequent communication with all stakeholders. Communication tools employed by the project manager included:

- Communication liaisons
- PLSR website
- Toolkits
- Conferences
- Virtual Q&As

Each of these are described below. By employing these tools along with centrally created messaging and existing channels throughout the community, information about the process was clearly and consistently shared with library staff, library system representatives, DPI, COLAND and other stakeholders. The project manager created a communication plan that identified appropriate channels for communications (project website, Google Community, etc.) and criteria for using these channels. The communication plan was updated as new communication channels were identified.

COMMUNICATION LIAISONS

A network of communication liaisons, one from each public library system, was created to share messages with the library community. The public library systems have well-developed channels for communication and significant experience in using these channels to communicate with their members. Tapping the power of these existing communication channels ensured that information about the process was shared not only at the state level but also within each regional system. The liaisons provided input and feedback about communications and shared messages developed centrally through system-level channels.

THE PLSR WEBSITE

The PLSR website was developed to be both a repository of information and a communication tool. The project manager posted all available workgroup meeting agendas, minutes and recordings to the site for the community's review. The project manager developed a blog that community members could subscribe to and receive daily updates to their inbox, including community update messages, public meeting notices and a weekly round-up of all the materials posted to website. Hearing feedback from the library community, the project manager added other features to the website, including a "What Questions Have Already Been Asked" section.

TOOLKITS

Working with members of the Steering Committee, the project manager created two presentation toolkits for their use and for the library community. In late summer/early fall

2016, the Steering Committee and workgroup members attended public library system meetings of library directors around the state in order to share an overview of the first phases of the PLSR project. The presentation, both slides and script, along with informational handouts, was created to share a unified message. All materials were made available on the PLSR website. Again in September 2017, Steering Committee members traveled to different locations in the state and shared PLSR updates, using this toolkit model. In this instance, presentations were not held during system meetings, but rather at libraries to encourage attendance by all staff of libraries and systems.

CONFERENCES

Recognizing that annual conferences allow community members to learn, ask questions and offer feedback, the project manager facilitated sessions and events at the Wisconsin Association of Public Libraries (WAPL) annual conference in 2016 and 2017 as well as at the annual Wisconsin Library Association (WLA) conference in the same years. Activities included:

- WLA 2016: Session titled, "A Conversation with the PLSR Steering Committee," session titled, "Notable Reports Panel: PLSR Edition" and a multi-day poster session staffed by workgroup members and project manager, to share model ideas and gather community feedback
- WAPL 2016: Session titled, "Public Library System Redesign Project Update & Discussion," and PLSR Town Hall
- WAPL 2017: Session titled, "Public Library System Redesign Project Update & Discussion – Topic Teams," a special event, "PLSR Community Conversation Night," and the opportunity for community members to ask questions and share feedback in writing throughout the conference.
- WLA 2017: Series of sessions where each workgroup presented their model. Sessions were recorded and shared on the PLSR site, along with the slides, for community members that were unable to attend

VIRTUAL Q&AS

To keep the library community up-to-date on the process, the project manager and Steering Committee provided updates through Virtual Q&As, hour-long webinars held once a month. Sessions included workgroup-led model updates, Steering Committee updates, workgroup reports and more. These sessions were promoted using the PLSR communication channels and recorded.

It was the project manager's intent, using all of these channels, to create and maintain the most transparent and open process possible.

BEYOND THE WORKGROUPS – COMMUNITY CONTRIBUTORS

Public library community members and experts populated the workgroups and Steering Committee, but in order to learn more about community needs and wishes as well as to test ideas, the project manager facilitated the creation of a Survey Panel and workgroup Review Panels.

- **Survey Panel:** As the workgroups developed their models and topic teams created their recommendations, the intent was for the workgroups to use the survey panel to gather opinions and thoughts from the library community in a systematic way. Promoted widely, library and system staff and trustees were encouraged to sign up to ensure that the process and its outcomes reflected the community's needs. 226 individuals signed up for the survey panel. The project manager did use the survey panel for work with the topic teams, but it was not as well utilized by the workgroups as anticipated, partially because of the success of the review panels (see below).

- **Review Panels:** Workgroups identified service users as well as public library community members and people outside the library world who could offer valuable perspectives. Review panelists reviewed workgroup documents and proposals, looking for areas that needed more data or better articulation. Panelists, where necessary and appropriate, poked holes in the recommendations and shared areas of weakness so groups could strengthen their models. Often, panelists also expressed their excitement about model ideas and shared where models were particularly strong. Over 40 individuals served on review panels. Complete lists of review panels are available in the individual workgroup reports. The review panels proved to be a very valuable resource to many of the workgroups. How models changed based on review panel feedback is described in each workgroup's report.

There were also countless individuals who took the time to attend conference sessions, join public meetings, review documents and models in order to understand the process and recommendations and to offer feedback to help the workgroups refine their models. Feedback was received in the form of emails to the workgroups, project manager and Steering Committee as well as during presentations and meetings.

ABOUT THE WORKGROUP REPORTS
WHAT THEY ARE AND WHAT THEY ARE NOT

The PLSR process asked workgroups 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.

The workgroup reports present the ideas of the experts and consumers. These ideas have been carefully and repeatedly vetted and are supported by feedback and information gathered from other states and our own. Multiple sources reviewed the models. The recommendations are thorough and thoughtful, but they are one piece in the puzzle. The workgroup reports and recommendations should be viewed as roadmaps for how services can be provided. As a guide, they can only provide a certain level of specificity, particularly because the structure decisions made by the Steering Committee will determine where authority lies for decision making related to staffing, compensation levels and procurement.

What is contained in each report

To answer the question posed to them, the workgroups created a model of service. Each workgroup report contains information about which services and activities are included in the model, how the workgroup envisions the services being delivered and accessed, and if services would be provided regionally or centrally. The workgroups also provided information on the following:

- Why this is the right model
- An articulation of the problem(s) that is being solved with their recommendations
- What the group hopes to achieve with their recommendations, including equity measures
- Information and data that led to and/or helped develop the model
- Feedback received and how the model was or was not refined or changed based on that feedback

In addition to the service model, the report for each workgroup includes suggestions or recommendations in the following areas:

- **Staffing**: 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.

- **Costs:** Workgroups have provided rough figures for what their new model might cost. The costs for staff are based, depending on the service area, on existing salaries from either within or outside the community. These are generally presented as a range of costs.

To provide some consistency among workgroups, a common salary was used for professional and support positions as much as possible. The professional salaries, especially those library-oriented positions, were determined by the CE and Consulting Workgroup, based on the average of actual salaries of system consultants. The library support positions were based on the "library technicians" occupation profile from the Bureau of Labor Statistics Occupational Employment Statistics (OES)[4]. Data from May 2016 was downloaded from the Wisconsin LMI Data Access site, and the salary for the 90th percentile of library technicians was used[5].

Some costs, such as equipment, are service area dependent and those are included in the appropriate workgroup recommendations. Each workgroup report explains how they arrived at their numbers.

There were costs, however, that could not 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 workgroups discussed each of these costs and what follows is a summary of those discussions, along with some general information about each area.

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[4] Bureau of Labor Statistics Occupational Employment Statistics, Occupation Profiles
https://www.bls.gov/oes/current/oes_stru.htm
[5] Wisconsin LMI Data Access site https://jobcenterofwisconsin.com/wisconomy/query

Cost area	Notes
Space and utilities	Many service areas have identified a need for multi-purpose space for training and meetings: • Collections: The model includes the hardware and software needed for a centralized scanning facility, but does not include the space and utilities. • ILL\ILS: The regional and state ILL hubs will need space for mailing materials. • Technology: The model includes two data centers. While the equipment needed for those datacenters is included, the space and utilities is not. Technology staff would also need storage for parts/computers, and a lab space for testing.
Administrative support	• General clerical support for all service areas. • Fiscal support to handle payroll, ordering, revenue and expenses for all service areas. Some services with large amounts of specialized procurement have included this need in their models; others would need this assistance. • Human resources assistance for all service areas. • Data and assessment assistance for all service areas. • CE-Consulting: providing logistic support to CE events, including registration and venue coordination. • Collections, Delivery and Technology would require more fiscal support because of the number of bill-backs and invoices being processed for payment.
Travel	• General travel for conferences and meetings for staff in all service areas. CE-Consulting: Consulting staff will be on-site at libraries regularly. CE staff will travel to in-person workshops. • Technology: PC techs will be frequently traveling to libraries to perform on-site work.

Staff development	• General professional development for staff in all service areas. • ILL\ILS: Specialized training and user groups for technical staff on software platforms. • Technology: Specialized technology training (which is typically more expensive) for staff.
Design	• Graphic design assistance for the development of marketing and other print materials and web presence for all service areas. • Video design assistance for the creation of training and promotional videos for all areas.
General office supplies, equipment, and software	• Computers, printers, phones, wireless access points/hot spots and general office supplies for all service areas. • General office software and other software including survey software, data analysis software. • Projectors, portable labs/training kits and other equipment needed for meetings and trainings. Reservation and scheduling software for this equipment and shared spaces. • Video camera(s) and video editing software for producing training videos. • Virtual meeting solution for all service areas with enough capacity to support the CE program. • Team communication software (e.g. Slack, Microsoft teams) for all service areas.
Other	• Some service areas identified the value of having access to grant writing/development staff.

- **Implementation:** The workgroups have provided a variety of 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:** In this section of their reports, workgroups have provided recommendations for service accountability and service user involvement, including feedback mechanisms.

The intent of these recommendations is to provide the Steering Committee with information as they consider overall governance and structure.

SOME POINTS TO KEEP IN MIND WHILE READING THE REPORTS

The reports are limited to the scope of the workgroups' charges
From the start of the process, workgroups were 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, workgroup recommendations do 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?

There are no concrete borders on proposed regions
Some of the models (Delivery, Technology and ILL\ILS) include region-level services. Each of these service areas have dependencies on the others and recognize the need for coordination of what is defined as a region. At the same time, they recognize the need to be flexible to accommodate change and evolution. For example, as regional ILSs combine, delivery regions may need to change to most efficiently provide services. As such, there are some proposed regions within the workgroup models, but the expectation of all workgroups is that regions will evolve over time in order to provide the best possible service.

Adding up staffing numbers is not going to give an accurate picture of what is being proposed
The workgroups were 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 these recommendations are ballpark estimates that give a sense of cost to help contextualize the models. In most cases, it was impossible to compare current costs of services with the recommended services for two reasons:

1. Over the course of four decades, accounting practices have evolved differently at each library system, making it difficult to definitively state how much a particular service costs in each system. The Funding and Cost Standards Subcommittee of the Steering Committee has produced a best attempt to reconcile these different practices, but it, too, is not a perfect instrument.
2. The workgroup budgets do not include "administrative costs." As mentioned above, there are certain costs that could not be determined until a structure is recommended by the Steering Committee. These costs are not included in the workgroup budgets.

More philosophically, it is impossible for the workgroups to estimate what the libraries (and patrons) are losing by not having access to the recommended services. For example, what services could a library provide if staff were not spending time fixing computers, something someone else could do much more efficiently? What if consultant services existed equitably across the state, ensuring all libraries have access to information and guidance to improve services to their communities, rather than having to spend time seeking out the information themselves or, worse, providing lower quality services to their community because this knowledge is not available to them?

Synergies exist among the proposed service models

Through the work of the Topic Teams, other communication between members of different workgroups and the workgroup coordination managed by the project manager, there are a number of areas where the components of the workgroup models align, such as staffing or location needs. These are opportunities where the Steering Committee can leverage the synergies as they develop their structure recommendations.

Implementation recommendations vary in completeness and complexity and should be considered a starting point

Workgroups considered implementation options very thoughtfully. In some cases, the models lent themselves to more complete phased implementation plans. In other cases, the workgroups felt that some first steps would be required before a more complete implementation plan could be developed. In cases where there are existing entities providing statewide services in the service area, implementation plans are less complete because the

implementation process is so dependent on decisions about who will do the work. Regardless of what is proposed, the library community will learn through implementation and will refine models accordingly. Additionally, the conditions may change during implementation, opportunities may arise and challenges may occur, and, therefore, these plans should be considered a starting point.

Change can be unpredictable
Conditions change. In the last few years, there have been full system mergers as well as ILS mergers between three systems. Budgets are always changing and staffing can be hard to predict. Technologies and patron expectations are always changing. This lack of predictability made it difficult for workgroups to recommend precise services and budgets.

Governance recommendations are general and limited to assessment within the model
Without a clear understanding of structures supporting the service models, workgroups were unable to offer governance and accountability recommendations beyond the scope of the services. For example, workgroups could not recommend appointing authorities, though they could recommend oversight bodies for the service.

The models are future facing but not futuristic
Each workgroup was given a service area to consider and was asked to redesign the current service while keeping the future in mind. 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. For example, the technology workgroup discussed computers in libraries and their model includes computer support, as this is what libraries currently have. However, technology needs change rapidly, so the workgroup discussed how their model would support and adapt to other futures.

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. As previously mentioned, 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. These sources include Principles of Structure approved by the Committee that sets the goals for outcomes of this phase, Chapter 43 research, Human Resources Subcommittee work, Funding and Cost Standards Subcommittee report, county relationship summary, system administration duties summary and the results of library director focus groups and a survey of public libraries administered by Russell Consulting, Inc. Lastly,

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.

ONE RECOMMENDATION FOR IMPLEMENTATION FOR ALL WORKGROUPS: HELP CENTER/PORTAL

From early in their discussions, many of the workgroups identified the need for a "portal" for libraries to find information and request assistance. Because the topic crossed multiple workgroups, a Help Center Topic Team was formed to make a recommendation to all workgroups:

The team recommends a single online location for library staff members to enter questions, pick a specific area of need, and, through prompts make sure their question or request is routed to right person. While an online help desk/portal will meet most needs, the team recognizes that there must be a central phone number for emergencies. Help desk users should also be able to reach out to someone they know and that person could in turn add to the ticketing system, if appropriate, to make sure the question or request for help is answered. The help center will also include searchable resources in topic areas, including but not limited to access to continuing education webinars and trainings, marketing materials, sample policies, purchasing information and offers, certification credit tracking, etc.

The Topic Team suggested that the Technology Workgroup be responsible for determining "staff for construction and maintenance of the help center structure." Because the vision of each workgroup for a help desk/portal in the service models was still under development, it was not possible to determine exact specifications for the portal and help center while the workgroups were completing their models.

Now that this work is done, an early implementation step could be developing a design for the help desk/portal. Using information from the workgroup reports and discussing needs with experts in the community, complete specifications could be developed and, once some of the technology infrastructure is in place, the help desk/portal could be implemented. For a number of the workgroups, the development of the help desk/portal is critical to most effectively and efficiently implementing their service models, both for those providing the services and the libraries using the services.

ACKNOWLEDGMENTS

Since the first workgroup meetings in June 2016, the workgroups have met over 120 times in total. They also attended PLSR events at conferences, presented to others in the library community, performed research, designed surveys and wrote careful and comprehensive recommendations to improve service equity for all libraries in the state. Hours and hours went into the recommendation reports, all of which were volunteer. Truly, the dedication of the workgroup members was awe-inspiring. They were challenged to think about services to all libraries and thus to all patrons, putting aside their needs and the needs of the libraries and systems they represented. This was no small feat, but through it all, the workgroups were thoughtful, creative, analytical and dedicated to making library services better for everyone. We sincerely thank the workgroups, with special acknowledgement for the workgroup leads and facilitators who organized their workgroup's efforts and worked with the project manager closely in order to ensure a successful process.

The support and leadership of the Steering Committee cannot be overestimated. Just as workgroup members met on a voluntary basis, so too did the Steering Committee. Members served as liaisons to workgroups, helped guide the project manager, offered their own expertise, shared communications with their communities, presented at conferences, participated in virtual Q&A sessions, attended regular library community meetings and traveled around the state to openly share information about PLSR and to openly receive feedback from staff and trustees of libraries and systems. They were spokespeople of the process and the community. The project manager is deeply grateful for the leadership and compassion of this fine group of professionals.

Staff of the Department of Public Instruction were invaluable throughout the PLSR workgroup process. As workgroup liaisons, they offered their expertise and knowledge as well as their note-taking skills. They met on a regular basis with the project manager to make sure that the needs of the Steering Committee and workgroups were communicated to DPI and its leadership. They helped locate experts in the state and outside Wisconsin's borders to help workgroups as they gathered information. In short, they supported the PLSR process from top to bottom, inside and out. The project manager would like to thank Assistant State Superintendent, Division for Libraries and Technology, Kurt Kiefer and State Superintendent Dr. Tony Evers for their support of the process and their willingness to share their time and expertise to ensure its success.

Special thanks are also extended to those that helped the workgroups as they gathered information and researched the landscape of collaborative public library services across the nation. Library professionals and service experts from state agencies, libraries and non-profits

took surveys, answered emails, took phone calls and participated in webinars. We sincerely appreciate their willingness to share their experiences and expertise.

And, finally, a sincere thanks to the library community. You read reports, took surveys, attended presentations and listening sessions, shared ideas for service and equity improvement and served as resources and inspiration. We know that the process was complicated, sometimes moving too fast and at others points far too slow; sometimes it felt like there was not enough information and at other times, there was an unending stream of communications. Thank you for patience. Thank you for your assistance. Thank you for your involvement. The PLSR process could not have happened without you.

APPENDIX A: HELP CENTER FINAL REPORT

DEFINING THE HELP CENTER
- *Help Center is central, but help may be regional*
- *It should make excellent service more equitable across the state*
- *Trusted information and answers are critical*

Charge: This team will make a recommendation about how library community members can most efficiently and effectively get the help they need by considering an online portal and help desk possibilities after reviewing what other states are doing, what exists in Wisconsin currently, and the articulated needs and desires of workgroups.

Summary: The team recommends a single online location for library staff members to enter questions, pick a specific area of need, and, through prompts make sure their question or request is routed to right person. While an online help desk/portal will meet most needs, the team recognizes that there must be a central phone number for emergencies. Help desk users should also be able to reach out to someone they know and that person could in turn add to the ticketing system, if appropriate, to make sure the question or request for help is answered. The help center will also include searchable resources in topic areas, including but not limited to access to continuing education webinars and trainings, marketing materials, sample policies, purchasing information and offers, certification credit tracking, etc.

Data and information gathered: The team reviewed the following information:
- Responses to a post made to Techatalka asking for feedback on help desk ticketing systems.
- A review of Cooperative Educational Service Agencies (CESA) and UW Colleges support models.
- A review of Cities and Villages Mutual Insurance Company (CVMIC) training and educational resources.
- An examination of other state pages and portals, including those from Minitex (Minnesota), Iowa, and Nebraska.
- Survey results from 90 respondents from the PLSR Survey Panel.

Benefits
- A centralized help center would take guess work out of asking for help. Community members should not have to spend time thinking about who is the right person to contact about an issue.

- Equitable access to reliable help and excellent training resources.

Concerns and questions:
- Some systems already provided some form of reliable help options and members of those systems do not want to lose that level of service.
- Survey results showed a great deal of interest and many ideas for what could be on a central portal, so building a system that can manage critical needs now but grow in the future is very important.

Workgroup determinations:
- The *Technology workgroup* will be responsible for determining staffing for construction and maintenance of the help center structure. The structure, in particular the ticketing system, must be simple enough for community, front end use, but have a robust backend that will allow for tickets to be passed back and forth and tracked to avoid requests falling through the cracks.
- *Each workgroup* will need to clarify in their model what they would need maintained for content and tools on the central portal.
- *Each service area* should consider in their models an estimated time that creation and maintenance of content will take, rather than a number of dedicated staff.
- Workgroups will need to answer
- How many people will be available to respond in service areas to help desk requests
- What is central/portal and what is regional/people in their models
- There must be an understanding from all workgroups that the addition of content to any help center must be done consistently and time must be factored in for coordination.

APPENDIX B: INITIAL DELIVERY SERVICE HUB MAP FOR PLSR REGIONS TOPIC TEAM
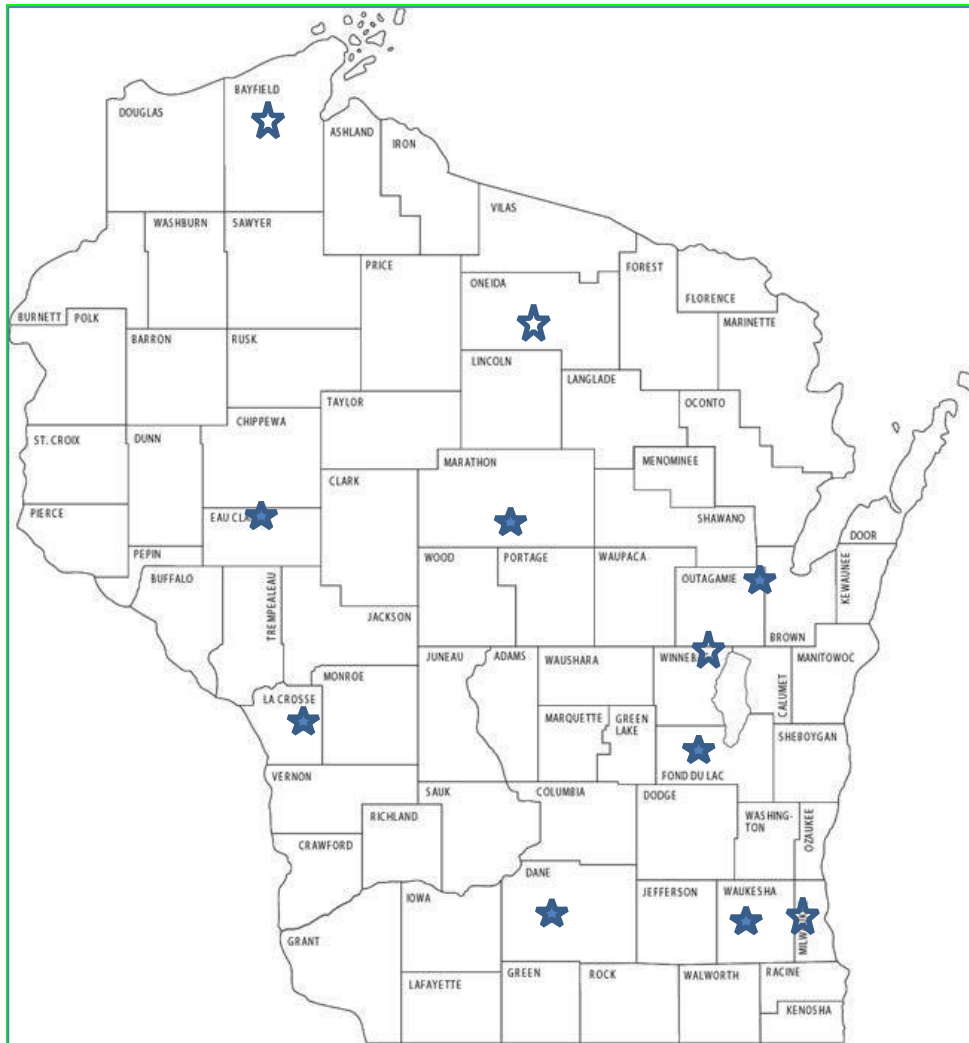
The map is a starting place for the PLSR Delivery workgroup to work from to determine route service details and vendor options for providing delivery services to libraries. Based on detailed route mapping and design that the workgroup will be doing along with potential vendor options, delivery service hubs and corresponding service areas may change in the final delivery model recommendation.

Service Area 1 (Northwest):
With a primary service area hub of Eau Claire/Chippewa Falls, a secondary service area location further north, depending upon whether delivery is provided "in-house" or via a private courier,

may be needed to serve some locations from a central base of Ashland. It is possible Superior may be found to be a better location for the secondary hub.

Service Area 2 (North Central):
Locating a hub in or near Wausau, Mosinee, or Stevens Point is advantageous to a larger population base in the south. Concerns would be longer distances and times to the far northern edges of this region and whether counties could be added or subtracted to/from neighboring regions (Price or Vilas) or if a secondary hub could be added if service is provided "in-house".

Service Area 3 (Northeast):
Location a hub in Green Bay is logistically advantageous as a "pivot point" north to either side of the bay.

Service Area 4 (West):
Locating a hub centrally would provide best access to I-90 and the population of LaCrosse. Tomah at the junction of I-94 and I-90 could be a pivot point too and also offer a better connection to the overnight exchange. The negative is that it would be anchored to the far eastern edge and not central to the region itself. Adams County with just 2 public libraries are situated nearer to Juneau County neighbors.

Service Area 5 (East):
Locating a hub at the southern edge of Lake Winnebago in the Fond du Lac area offers a pivot point from which to send routes east or west of the natural barrier and remain central to this large and populous region. It is possible, if provided as an "in-house" service, that a secondary hub in the Appleton area may be needed due to potential volume because of the population in this service area.

Service Area 6 (Southwest):
With a hub of the Madison vicinity it may not be central to the whole territory but it is nearest to the high population of Madison and Dane County as well as the University of Wisconsin flagship campus. 3 interstates intersect through Dane County and provide ample connection to the rest of the network as well.

Service Area 7 (Southeast):
With a primary hub located in Waukesha County along the interstate corridor, access is efficient throughout the region in this populous, suburban region. Milwaukee County could have its own secondary hub, which currently is headquartered at the Milwaukee Public Library.

APPENDIX C: RESOURCE SHARING TOPIC TEAM REPORT

RESOURCE SHARING

- *Patrons should have an experience of finding and getting an item easily*
- *Patrons should be able to go where they want to go*
- *All solutions need to make things easy for the patron and should make things better for libraries*

Charge: This team will work to bring cohesiveness to the models proposed by the workgroups involved in resource sharing, particularly ILL, ILS, Delivery, and Collection. They will address overlaps, lack of clarity of responsibilities, and best practices for workflows that interrelate.

Summary: After analysis of workgroup models and feedback from community, the Resource Sharing topic team recommends the patron experience be at the center of all decisions made by workgroups in regards to resource sharing. The long-term goal is to improve access and service for patrons and to do that, the structure must be built to be flexible. This requires that discovery and fulfillment not be limited to scoping an ILS first before moving to outside ILS. It also requires that libraries participating in a larger discovery layer meet certain standards related to willingness to share. The group also affirmed that greater resource sharing achieves significant efficiencies, especially in terms of cost sharing.

The topic team, based on current levels of interest, have decided not to recommend looking into shared collections at this time. However, it encourages workgroups to develop models that would allow for shared collections in the future.

Data and information gathered: The team reviewed the following information:
- Workgroup service models
- Survey results from 79 respondents from the PLSR Survey Panel. Most survey respondents showed a willingness to share their collections

The team also discussed existing models in the state for resource sharing, including the Wisconsin Public Library Consortium (WPLC) and Systems.

Concerns and questions:
- Local control issues need to be dealt with

- o Although WPLC has been a successful attempt at statewide resource sharing, it has been limited to electronic content. It may be that local control is more tied to a physical collection, especially in terms of fines and loss of materials.
- There are potential roadblocks in the current Chapter 43
  - o County divides potentially make things very difficult (124th street divide as an example) for in-person resource sharing. For some, closest doesn't necessarily mean a patron (right now) can get the material.
- It can be difficult to come to agreement around lending rules.

Workgroup determinations:
- The model of the *ILL / ILS Discovery workgroup* should not be limited to scoping discovery to a "home" ILS first before moving to outside ILS.
- The *ILL / ILS Discovery workgroup* should develop recommendations for required standards around willingness to participate in a larger discovery layer.
- *The ILL/ILS Discovery workgroup* should think about the question, "When we are talking about ILL in these models, are we talking about libraries or individuals being responsible for loans?
- *The ILL / ILS Discovery workgroup* should account for vision of patron experience in the future.
- Innovations that should be considered include, but are not limited to:
  - o Simplified and mobile discovery of digital material
  - o Scoping of results
  - o Geo location capabilities so patrons can find the nearest library with a physical item
  - o Tracking of requests by patrons
  - o Search results that contain the different formats available of an item (FRBRized records)
- *The Delivery workgroup and ILL/ILS workgroup* should consider non-public libraries and how they fit into resource sharing (expanding out after searching public libraries first) and the issue that discovery does not necessarily equal availability.
- *The Delivery workgroup* needs to consider readiness of their model for future locations for repository/storage facilities.
- *All workgroups* that were part of this topic team should consider and if appropriate include data that shows how lending patterns and payments might be impacted by a larger sharing area.
  - o Example: usage data in merged systems or systems that added counties
- The *Chapter 43 workgroup* should analyze and make recommendations in regards to the existing lending barriers that exist in state statute.

APPENDIX D: REGIONS TOPIC TEAM REPORT

REGIONS TOPIC TEAM

Most of the service workgroups (Collections, CE-Consulting, Delivery, ILL-ILS & Technology) have developed draft models to include centrally-coordinated and managed services that use field offices or service hubs in different geographic regions of the state to manage and provide some of those services.

For some services, like Delivery, having a clearly delineated group of libraries that are served by the service hub, is critical.

For other services, like Consulting, it is less important that libraries are permanently grouped into a unit served by a particular hub. While the consulting model calls for consultants to be regionally located around the state, libraries in a consulting service area won't be limited to just those consultants located in that region, but rather the consultants will work as a team around the state and the expertise of all the consultants and services in the consulting model will be available to all public libraries in the state.

The workgroups are still each determining what services or levels of service will be coordinated or provided centrally and what will be coordinated or provided in a regional service area from a field office or service hub.

In order for them to make these decisions and finalize their recommendations, they need to have an understanding of where service hubs or field offices might be located. The Regions Topic Team was formed to provide this understanding.

The Topic Team, to accommodate both the needs of groups like Delivery and Consulting, has created a map of potential hub locations, rather than a map that establishes firm borders for services. These locations were based on the needs of Delivery (see below for more information). Delivery has taken that map of hubs and outlined the groups of libraries that may be served by each hub. Each workgroup will determine how concrete these lines need to be for their workgroup (or if they need to exist at all) as part of the next steps in their process.

BACKGROUND FROM THE TOPIC TEAM

The Topic Team, which consists of representatives from the service area workgroups, has discussed the factors that each workgroup needs to consider as it develops the "where" in their models. The list includes:

- Collections
  - The regional digitization services can fit within other groups' models and needs.
- CE and Consulting
  - Mileage for libraries to attend in person trainings is within a radius of 100 miles. This proximity will also meet the needs for consulting staff to travel to libraries.
- Delivery
  - Libraries served by a regional hub are preferably within a 100-mile radius.
  - Hubs are ideally centrally located within a region.
  - Hubs are ideally proximate to the interstate.
- ILL / ILS
  - Libraries that have significant cross-lending are in the same region.
  - Population centers
- Technology
  - Regional structure allows for redundancy among staff to ensure services are always available.
  - Travel time to libraries is reasonable.
  - Locating technology staff near delivery hubs is idea to efficiently ship equipment to and from libraries.
- Non-workgroup factors
  - Given that counties are so integral to library services, service areas would be developed according to county lines as much as possible.

The Topic Team determined that regional field office/service hub locations have the biggest logistical and model design impact on delivery, and that delivery should create an initial map of where hubs would best be located and what service areas might be served by the different delivery service hubs. It is to be emphasized this is just a starter map that delivery will use to further develop its model. Delivery service hubs and corresponding service areas may change in the final delivery model recommendation based on the detailed route mapping the workgroup will be doing.

Each service workgroup will use the initial delivery map as a starting point for determining how they will develop their map to best provide the services in their model. They may determine the delivery service map framework is something that works for their needs or that they need to develop a different service map based up on the factors articulated for their service areas.

APPENDIX E: TABLE OF ROLES FOR PROVIDING CE AND CONSULTING

Library continuing education/training need	Service staff role	CE staff role
Training to library staff for using and troubleshooting the basic software and hardware in the library that technology provides to the library for staff to do their jobs.	Technology staff responsible for developing training	
Training to library staff to provide assistance with patrons' personal technology needs (devices, software, etc.) related to new tools, tips and tricks. Training to library staff for advanced training on tips and tricks for software.		*CE staff develop these trainings/CE offerings as part of their regular CE program planning.
Training and documentation to library staff for using ILS/ILL software	ILS/ILL staff responsible for developing training	
Electronic Resources (databases and digital content) training	ER staff or vendor experts assist with content and presentation of trainings	*CE staff develop these trainings as part of their regular CE program planning.
All service areas developing and providing trainings that are broadly available for library staff (i.e. group trainings, not one to one) coordinate scheduling and communications about the trainings with the CE team.		
*CE staff will provide learning platform and methodology expertise, training and assistance to the other service areas as requested.		

Library consulting need	Service staff role	Consultant staff role
Technology infrastructure recommendations and expert planning assistance for new building/renovations	Technology staff experts provide consulting	Connect libraries to technology expertise as appropriate
Technology purchase and upgrade information and recommendations	Technology staff experts provide consulting	
Technology planning and budgeting assistance for current and future library technology needs	Technology staff experts provide consulting	
Investigating new technologies	Technology staff experts do research and development	
Information and recommendations for equipment needs and upgrades (RFID, self-check, AMH) and for software/subscriptions specification requirements (Hoopla, etc.) that connect with the ILS	ILS staff experts provide consulting	Connect libraries to ILL/ILS expertise as appropriate
ILS assistance in relation to ILS material processing and material handling workflows	ILS staff experts provide consulting w/ delivery staff expertise as needed	
ILL workflow assistance	ILL staff experts provide consulting	
Digitization – equipment, software, standards and workflows	Digitization staff experts provide consulting	Connect libraries to digitization expertise as appropriate