Wisconsin Public Library System
Redesign Project Management

Phase 2 Proposal
May 1, 2016 through March 31, 2017

1360 Regent Street #121 ● Madison, WI 53715 ● 608.216.8399
Phase 2 Goals

Phase 2 of the Public Library System Redesign (PLSR) project will consist of the following main goals for the workgroups and Steering Committee

Workgroups
1. Will have completed development of desired outcomes and vision for service models to be used to guide service model development
2. Will have completed gathering in-state and out of state data and information and performed a thorough assessment of data and information gathered
3. Will have, with input from experts, partners and the library community when appropriate and needed, designed a service model the workgroup will demonstrate to determine its effectiveness in achieving the desired outcomes and vision for the service
4. Will have either begun or will be ready to begin active service model demonstration through further assessment and testing of an existing service model, expansion or broader application of an existing service model or a demonstration of a new service model not currently in existence in the state

Steering Committee
1. Will have continued to provide process feedback and direction
2. Will have a process in place to develop an administrative and logistical service support structure that will best meet the needs of redesigned service models

Phase 2 General and Ongoing Project Management Activities

1. Communication
   a. Regular project communication development and distribution through communication liaison network and statewide communication channels, including maintaining project website
   b. Communication planning and coordination with communication liaisons, including developing a plan for more in depth process updates and education to library directors and library boards
   c. Monitoring concerns and potential issues and communicating appropriately and proactively to minimize issues
   d. Product updates and presentations as needed to groups including, but not limited to, DPI DLT & RL&LL teams, COLAND, SRLAAW, LD&L, and the DPI Cabinet
   e. Responding to questions and other community needs for information and process assurances
2. Workgroup Support
   a. Data and information gathering coordination, both for in-state and out-of-state
   b. Data and information assessment coordination and quality control
   c. Workgroup meeting logistics assistance and coordination
   d. Work plan, service vision, model and model demonstration development assistance and support
   e. Communication coordination
3. Steering Committee
   a. Administrative review and planning
   b. Process updates and review
   c. Records management
4. Overall process management
   a. Monitoring progress and adjusting activities as needed
   b. Developing and implementing appropriate activities to ensure a cohesive, positive, and productive process

Phase 2 Activities Timeline

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<th>Timeline</th>
<th>Project</th>
<th>Activities</th>
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| ONGOING                   | Workgroup Support | • Coordinate data & information collection and distribution among the workgroups.  
                           | Communication               | • Monitor progress of workgroups and facilitate information exchange among workgroups.                                                   |
|                           | Process management | • Create & distribute regular updates about project  
                           |                           | • Monitor concerns and potential issues and communicate appropriately and proactively to minimize issues.  
                           |                           | • Respond to questions and other community needs for information and process assurances.                                                   |
|                           | WAPL Prep     | • Develop presentation  
                           |                           | • Develop and prepare for Town Hall event                                                                                          |
| May 1 through May 9, 2016 | Workgroup Support | • Schedule first workgroup virtual meetings  
                           | Communication               | • Coordinate a phone meeting with workgroup leadership  
                           |                           | • Schedule model development planning session and secure location  
                           |                           | • Prepare orientation of workgroup members (web videos)  |
|                           | Communication | • Update on workgroup activities and promote WAPL events  
                           |                           | • Prepare & deliver presentation for DPI Cabinet                                                                                          |
|                           | Steering      | • April 26, 2016 meeting: Phase 1 report, Phase 2 proposal, DPI cabinet presentation, DPI budget request  |
| May 11, 2016              | WAPL          | • Present project update program and facilitate Town Hall  |
|                           | Workgroup Support | • Deliver virtual orientations for workgroup members  
                           | Communication               | • Continue to gather and compile in-state data and information (including budget information)  
                           |                           | • Gather information from other states via surveys, webinars and other methods.  
                           |                           | • Develop common meeting process packet and meeting logistics tool kit  
                           |                           | • Plan, prep and hold 1st virtual meetings with each workgroup (introduction, orientation web videos review and Q & A, and establish leadership and meeting process)  
                           |                           | • Plan and prepare for model development planning session  |
| May 16 through June 17, 2016 | Communication | • 1st phase report/2nd phase process communication  
                           |                           | • Workgroup updates                                                                                                                          |
|                           | Steering      | • Begin administration structure process planning  |
| Week of June 20th 2016 | Workgroup Model Development & Planning 1-Day Session | • General workgroup orientation  
• Further development of desired service outcomes and visions  
• Work plan development for identifying models and developing model demonstrations, including continued data and information gathering and assessment as needed |
| June 27 through September 9, 2016 | Workgroup Support | • Coordinate gathering of out-of-state information.  
• Coordinate expert and partner participation as needed  
• Assist, coach and coordinate assessment of data and information and development of service models and model demonstrations  
• Hold workgroup meetings as needed |
| Workgroup Support | Communication Steering | • Ongoing workgroup updates  
• Administration and structure process planning |
| Week of September 12, 2016 | Workgroup Model and Model Demonstration Development and Planning 2-Day Session | • Continue model designing and model demonstration planning in coordination, as needed, with other workgroups. Create a result that will be used to communicate and educate others about the service model design at WLA in order to gather input from the community further assist with service model development. |
| September 19 through October 21, 2016 | Workgroup Support | • Coordinate review panel participation as needed  
• Assist with further development of exhibits for WLA  
• Hold workgroup meetings as needed |
| Communication Steering | • Workgroup updates  
• WLA  
• Administration and structure process planning  
• Develop WLA discussion session |
| October 25-28, 2016 | WLA | • Steering discussion program  
• Workgroup exhibits for model education and feedback |
| October 31, 2016 through March 31, 2017 | Workgroup Support | • Based on community feedback and review panel input, assist workgroups with fine tuning models and model demonstration plans, in coordination with all other workgroups as needed.  
• Coordinate service model demonstrations  
• Finalize progress report for Phase 2 and plans for Phase 3.  
• Hold workgroup meetings as needed |
| Communication Steering | • Workgroup updates  
• Service model and model demonstration updates and information  
• Administration and structure process planning  
• Phase 2 report  
• Phase 3 proposal |
| March 31, 2017 | Phase 2 Completion |
Phase 2 Activity Time Estimates

- **Workgroup, Steering and other in-person (Madison) stakeholder meetings - 396 hours**
  - Based on 6 hours per meeting (pre and post meeting activities along with attendance) @ 66 phone/virtual/Madison meetings (9 workgroups x 6 meetings plus 12 other meetings with DPI, Steering Committee, etc.). If in-person meetings are not held in Madison, there will be additional travel time and cost.

- **Data and Information - 178 hours**
  - Includes continuing to gather data and information from in state and out of state, communication with different sources of information, compilation, distilling and presenting information for all workgroups.

- **Workgroup Orientation - 32 hours**
  - Development and delivery of orientation materials and tools, such as web videos, to bring workgroup members up to speed on processes and expectations.
  - Support time for helping workgroup members get set up with different tools.

- **General Workgroup Support - 432 hours**
  - 1 hour per workgroup per week.
  - All the other work (outside of events, meetings and data/info gathering) we will need to be doing with workgroups to help manage their group’s work and coordinate the efforts of all workgroups.
  - Problem solving with workgroup leadership

- **WAPL - 30 hours**
  - Preparation and delivery of PLSR update program and Town Hall event, including preparing workgroup leadership for their roles with these activities.

- **Workgroup Model Development & Planning 1-Day Session - 96 hours**
  - 60 hours – all meeting and participant logistics and process preparation
  - 12 hours attend per person @ 3 people

- **Workgroup Model and Model Demonstration Development and Planning 2-Day Session- 120 hours**
  - 60 hours – all meeting and participant logistics and process preparation
  - 20 hours attend per person @ 3 people

- **WLA - 30 hours**
  - 12 hours - Coordinate workgroup booth displays
  - 8 hours - Coordinate Steering Committee session – submit program and organize/coordinate presentation/session.
  - 10 hours - Attendance time at session or booth.

- **Communication - 246 hours**
  - 40 hours - Communication liaison meetings and coordination: 10 @ 4 hours each prep/attend/post meeting work
  - 80 hours - Message development and distribution (20 total for the year...a little less than 1 every 2 weeks) at 4 hours per message. Includes communication with workgroup leaders to gather and organize progress reports and other workgroup information for sharing.
30 hours - Event/milestone communication including 2 broad communication efforts to library directors and boards via PLSR ambassadors in each system (communication, liaison, workgroup leader and facilitator, and steering rep) after WAPL & WLA.

96 hours - Process responsiveness to the community at 2 hours per week.

- Project Manager Internal Team Coordination - 240 hours
  - 5 hours per week

Phase 2 Costs

Phase 2 total: $150,000.00

This total includes the following:

**Project Manager** – $100,000.00

- Includes 1 FTE of WiLS staff time (1,800 hours) and benefits including paid time off, and other project manager expenses and overhead including project manager travel costs.
- 1,800 hours at WiLS standard rate of $75.00 (not including mileage) would equal $135,000.00, thus, due to the size of the project, a discount of $35,000 is being applied to the project manager fee.

**Steering Committee Process Support** – $50,000.00

- This fund falls under the oversight of the Steering Committee. Use of this fund will support process needs, beyond the project manager contract, the Steering Committee identifies and approves as needed to best accomplish the goals of this phase of the process. Uses of this fund may include, but are not limited to:
  - library community engagement and input opportunities such as activities at conferences
  - workgroup meeting expenses including approved travel costs for in person meetings
  - outside expertise for workgroup service model development
  - funds to support service model demonstrations through replication or expansion of existing models, piloting new service delivery models or other means to demonstrate effectiveness of potential new models
- Uses of this fund will be developed by the Steering Committee as it provides direction for the overall process or from requests submitted by the project manager through the Phase 2 workgroup process including input received from the library community.

Projected Phase 3 Activities

The following is an anticipated list of activities that will occur during Phase 3, which will be from April 1, 2017 through March 31, 2018 and is planned to be the conclusion of the process to redesign services and systems. Due to the scale of this process and the need for a process that is flexible and adaptive to changing conditions and new information, these activities are only anticipated at this time.

- Further workgroup service model demonstration and development
- Workgroup development of service model implementation recommendations
- Steering Committee development of and recommendations for redesigned system and service administration structure.
- Broad library community communication and discussion of redesigned model recommendations