### General Model Info

#### Delivery
- All libraries within proposed regions get delivery from the regional delivery provider. The regions are connected by statewide delivery.
- Regions are sized according to logistics, are fewer in number and more uniform in size to accommodate all deliveries occurring within 8-9 hours per day.
- Regions are flexible to closely align to ILS regions.
- Service is coordinated with a statewide level approach that utilizes a multi-vendor approach at the regional levels for stability.
- It is a multi-type service to libraries and regions.
- Supports resource sharing and delivery for other types of items (furniture, kits, etc.) as needed between libraries.

#### ILL\ILS
- Regional ILS (not part of staffing model, still independently run), and were not considered as part of model development
- Encouraging collaboration/coordination among regional ILSs
- Also incentivizing ILS regions to consolidate
- Discovery platform: Regional ILSs and local ILSs are accessible through a single discovery platform (within what is technically possible).
- ILL system: for those not part of the discovery platform
- Staffing to support these two systems and also to help with the collaboration/coordination among regional ILSs.
- State-level ILL support and regional-level ILL support

#### Technology
- Tiered membership model
- Standard services:
  - Technology planning and consulting
  - PC and local computing services
  - Network services
  - Help desk services
  - Data services/authentication
  - ILS hosting and support of the infrastructure/workstation needs for ILS
  - Staff training
- Optional services at no additional cost:
- Email and email lists
- Innovation area
- Other additional services available for extra fee (filtering, electronic payments, VOIP, website design & hosting, time/print management)
- Centralized statewide structure for services that can be delivered most effectively at a statewide level
  - PC imaging/infrastructure/maintenance
  - Procurement
  - Network design/equipment/processes

Regional field offices to provide direct support/on-site work

### Collections

**Electronic resources:**
- Baseline of electronic resources
- Discovery through single access point listing resources at state and local levels
- Centrally managed evaluation, negotiation, purchasing, support, and assessment.

**Digital collections**
- Central agency providing digitization services (includes centralized reformatting center)
- Centralized services include project evaluation, consultation, digitization and reformatting, metadata creation, preservation, and hosting.
- Traveling digitization kits for content not centrally digitized. One kit per region.

### Consulting/CE

- The workgroup has organized consulting and continuing education into four service areas with an online portal as a vital fifth area that will be utilized by each of the four services: Continuing Education, Services Consulting, Organization Consulting and Facilities Consulting.
- Staff on the consultant teams will be dispersed across the state and libraries will have primary regional contact.
- Flexible model that eliminates silos of expertise to allow for collaboration and connections to happen as needed across the state for all libraries.

### Resource Libraries

- Eliminate statutorily mandated regional resource libraries. However, regional and statewide coordinated services to libraries should continue to be contracted with libraries, current resource libraries or other, when determined to be most effective and/or efficient at improving equitable access to services and resources for all libraries and leading library service innovation into the future.
- Establish, in statute, a single state resource library to be responsible for the coordinated development of and access to specialized collections at public libraries throughout the state.
• Cultivate and connect the expertise, leadership and capacities that currently exist in libraries throughout the state to leverage the experience, knowledge and talents of those that directly serve patrons in developing and providing innovative services to communities of all sizes.

Administration

Management/coordination of service and staffing structure

| Delivery | • Visualize a statewide delivery service management team made up of a statewide delivery services coordinator and regional delivery managers (1.0 operational manager for in-house delivery; .25 vendor contract liaisons for contract delivery.). This team ensures consistency and quality of service across the state with regional managers overseeing daily operation or contract for regional service. The statewide delivery services coordinator objectively provides oversight and assessment of the statewide delivery model. |
|          | • Regional operational delivery staff are determined at the regional level based on vendor type (in-house or private courier) and local market. |
|          | • Having hybrid approach of multiple vendors and in-house service would allow for some minimal backup support if needed if issues in another region. |

| ILL\ILS | Visualize co-directors for all staff: one ILL focused and one discovery layer focused. All staff – both state-level and regional ILL support would report to these co-directors. All are working together as one team. |

| Technology | • Central and regional staff work closely together |
|            | • CIO oversees all centrally located technology staff |
|            | • Desktop & Systems Director oversees Desktop & Systems Department |
|            | • Network Senior Engineer oversees networking department |
|            | • Customer Relations Director oversees technology consultants and the 3 regional managers who oversee the help desk and support technicians |

| Collections | Electronic resources: All staff report to a .5 manager |
|             | Digital collections: All staff report to a .5 manager |

| Consulting/CE | • 4 of the consultants are managers of four teams. |
|              | • Consulting staff will work: |
|              | o As teams both regionally and statewide |
Across teams both regionally and statewide
- Primary consultant contacts will provide direct service and expertise and connect libraries to the expertise they need.

<table>
<thead>
<tr>
<th>Resource Libraries</th>
<th>Dependent on results of initial implementation action for Recommendation #2</th>
</tr>
</thead>
</table>

**Boundaries of service area**

<table>
<thead>
<tr>
<th>Delivery</th>
<th>Delivery service to libraries happens within 8 proposed regions with service borders being flexible to effectively and efficiently adapt to changes in the resource sharing environment and needs. There can be multiple ILSs served by a single region.</th>
</tr>
</thead>
</table>
| ILL\ILS | --Ultimate regional ILSs boundaries  
--Regional ILL service boundaries  
Priority 1: Meet the desired service outcomes  
Priority 2: Align with delivery and technology. |
| Technology | Proposed 3 regions, based on the ideal Delivery service map and distribution of expected technology needs.  
See map on page 14 |
| Collections | Suggested to purchase a traveling kit for each region but available to any library in the state. |
| Consulting/CE | Libraries will have a primary regional consulting contact they work with, but model allow for access to learning opportunities and consulting expertise regardless of a library’s location. |
| Resource Libraries | Dependent on results of initial implementation action for Recommendation #2 |

**Space and location**

| Delivery | Regional hub space needs and location are dependent on service provider (in-house or private courier) for regions and whether sorting location for the region is at the location of the delivery service itself or at a regional headquarters location or library.  
A physical location will be needed for regions with an in-house regional delivery staff. |
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<tbody>
<tr>
<td>ILL\ILS</td>
<td>Regional ILL staff: located within the regions they serve. Could be housed at delivery hub locations or nearby because of the need to move physical materials. Will need space for mailing materials.</td>
</tr>
</tbody>
</table>
If there are servers for discovery, inter-ILS, shared ILL, technical staff will need to be nearby.

Other than that, no locations indicated.

| Technology          | • Regional field offices will be located to service an optimal number of staff and public PCs
|                    | • Staff who work centrally may be located anywhere
|                    | • Locations may correspond with delivery hubs, resource libraries, other large libraries, or stand alone
|                    | • 2 data centers to host services and other regional services, such as ILS

| Collections        | Electronic resources: no specification
|                    | Digital collections: staff would be centrally located with the centralized reformatting center

| Consulting/CE      | • Flexible to fit location of staff to where headquarters are based for other services.
|                    | • Staff will need an office space, but also need to be equipped to work from outside of an office on a regular basis.

| Resource Libraries | Dependent on results of initial implementation action for Recommendation #2

### Governance

#### Types of governing bodies

| Delivery | • Statewide delivery advisory council made up of public library representatives from libraries of different sizes and regions and representatives from other library types participating in the delivery network.
|          | • This council will work in collaboration with the statewide delivery services management team to provide direction, oversight and accountability of the service.

| ILL/ILS  | **Advisory group:** representation based on factors such as population/size, geography, etc.; 3-4 reps per region; include variety of skill sets and backgrounds. They would cover:
|          | • Roles of centralized and regional services
|          | • Operations of discovery layer and ILL platform
|          | • Patron information sharing
|          | • Resource sharing (standards, dealing with complaints and non-compliance)
|          | • Best practices for regional ILSs

| Workgroups | address specific tasks as necessary. Make |
recommendations to the advisory group.

**Executive committee:** automatic appointees: representatives from each regional ILS, DPI

Other members from other stakeholders that would have term limits. Work towards consistency among the regional ILSs in the areas of budgeting, data reporting, policies, and other matters where consistency would benefit statewide resource sharing

| Technology | • A body that includes formalized representation of groups of libraries determined by region as an official path for raising questions or bringing ideas forward. Would provide communication in both directions and would provide advisory capacity for libraries. Would provide a way for staff to collect feedback and/or get approval for new services/policies.  
  • Informal user group to meet annually or semi-annually for libraries to interact with one another and staff. |
| Collections | Electronic resources  
  • Standing committee to determine the electronic resources to be part of the baseline resources. Equal representation of staff from urban, suburban, and rural.  
  • Committee will also identify new resources for testing, consider new formats, evaluate existing resources, and terminate ineffective resources. They would also develop policy to define and address e-resource issues such as accessibility, patron-privacy requirements, assessment practices, etc.  
  • The committee will gather public user input.  
  • Will form subcommittees or workgroups as needed. |
| Digital collections |  
  • Advisory group to discuss centralized collection’s growth and improvement.  
  • Will propose policy changes to assist local libraries in determining what collections they should prioritize for digitization. Annually review policies, including collection policy.  
  • Would include staff from public libraries as well as contributors and experts from other types of institutions that create digital collections in Wisconsin. |
| Consulting/CE | none |
| Resource Libraries | • Dependent on results of initial implementation action for Recommendation #2 |
## Service feedback/assessment

<table>
<thead>
<tr>
<th>Delivery</th>
<th>• Specify both ongoing cost analysis and use of established metrics to measure service efficiency, effectiveness and equity</th>
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<tbody>
<tr>
<td>ILL\ILS</td>
<td>Didn’t specify this on an ongoing basis; did provide some info on how they would assess the model on page 42</td>
</tr>
</tbody>
</table>
| Technology | • Customer Relations Manager will work to ensure libraries’ voices are heard if they are having issues or if they have ideas for improvement.  
• Use annual satisfaction survey to allow libraries to officially voice their opinions. An effective resolution process should be in place to address responses.  
• To evaluate the service model: surveying and other methods to measure the success of the service outcomes. |
| Collections | Electronic resources (from model assessment):  
• Usage statistics of baseline collection  
• Feedback from library staff and patrons, including satisfaction  
• Track number of libraries using centralized services |
| Digital collections | • Staff will provide annual report to advisory group on equipment use and process, including equipment evaluation from those using it.  
• Statistics on use of centrally hosted digital content, traveling kits |
| Consulting/CE | • Ongoing service needs and satisfaction information gathering.  
• Establishment of service metrics and data gathering. |
| Resource Libraries | • Dependent on results of initial implementation action for Recommendation #2 |

## General service accountabilities needs and concerns

| Delivery | • Transparency of provider selection process and any potential costs to participants is important.  
• Decision making regarding provider selection, both regionally and connecting hubs, must allow for discretion to select model with statewide, long-term service stability focus that is also efficient and effective. |
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<tbody>
<tr>
<td>ILL\ILS</td>
<td>• Representation from participating libraries, including a variety of library sizes and locations and should take steps to ensure fair and equal representation.</td>
</tr>
</tbody>
</table>
- Should promote consistency between regions of library service in the state in funding, staffing.
- Recognize the importance of local control especially over funding and fine structures.
- Quality of library service should be a primary consideration.

**Technology**

- MOU will help clarify accountability for both libraries and staff. This would include standards that libraries would need to agree to in order to get support.
- Long-term planning should be addressed as soon as the new structure is up and running.
- Recognize that a balance will have to be reached between the need of the Technology Services to implement standardization and the libraries’ desire to customize services to meet the needs of their patrons.
- Clear process for appealing decisions and policies will be critical.

**Collections**

Electronic resources
- Selection of resources should be grounded in librarian input and feedback from patrons.

**Consulting/CE**

- Not expressed in the report by the workgroup, but establishment of service metrics and data gathering could allow for standards to be identified.

**Resource Libraries**

- Dependent on results of initial implementation action for Recommendation #2

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**Implementation**

**General info**

**Delivery**

- A phased in approach over 5 years.
- Initial implementation is to establish proposed regional models in SE and NW parts of the state and convert their statewide connection to just having regional hubs connected.
- As a first step, envision needing to establish a statewide coordinator position to coordinate and facilitate implementation process and gathering information to assess and adapt model as needed.
- By end of year three, proposed regional models are established in all 8 regions and hubs are connected.
- After 5 years an approach is determined for establishing a recurring bid process to occur for regional service and service to connect hubs.
- The model would begin to be implemented through cooperation and collaboration among the systems.

| ILL/ILS | Identified five areas of planning (though report says 4):
<table>
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<tbody>
<tr>
<td>--Policy and governance discussions: there need to be discussions among the regional ILSs to figure out differences in policy and governance that would undermine the proposed shared platforms and work on which policies and governance elements need to be made more consistent or standard in order to build the model proposed. Once we know what things need to be addressed, need to determine how the community would want to address them. There are also some areas of the state that have complexities like closed borders for ILL or fees for cross-system borrowing. These would need to be identified and discussed.</td>
<td></td>
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<tr>
<td>--Working toward larger ILS regions: series of incentives to encourage partnerships and mergers. They identified two areas of the state that may make sense as starting points: Fox Valley and SWLS, but also felt that other areas of the state should be examined to identify other logical consolidations.</td>
<td></td>
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<tr>
<td>Should also be learning from those consolidations that have already occurred or are starting. Workgroup thought that collecting information from those who have already done it could help facilitate future consolidations.</td>
<td></td>
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<tr>
<td>--Returning most library materials anywhere in the state: This is something that actually should already be in place, but many don’t know it should be. Encourage the returning and make sure that everyone knows the procedures and how to market this.</td>
<td></td>
</tr>
<tr>
<td>--Implementing a pool of funds to help support out-of-state ILL: Cost for shipping materials back is a purported barrier to out-of-state ILL. Workgroup is proposing a fund to cover the costs of return postage. Not much money, relatively easy to implement, equity win.</td>
<td></td>
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<tr>
<td>--Determining needs and finalizing roles for centralized staff: further needs analysis to determine most valuable shared services that centralized staff could provide. Hire co-directors first to do this work and also plan for the rest of the implementation.</td>
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</table>

| Technology | 5 year implementation plan |
Gradual implementation to minimize disruption and take advantage of existing infrastructure, staff knowledge, and relationships.

Year 1 would be for planning and for developing procedures. Year 2 would begin the onboarding phase, including the start of building the statewide network and first data center, testing help desk, and onboarding. Year 3 brings in the regional managers. Year 4 adds more regional support personnel based on what libraries are participating. Year 5 is less predictable, but full implementation is expected.

Collections
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There are existing providers of these services to be included in implementation.

Consulting/CE
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- Initial implementation starts with the following:
  - Building the portal
  - Identifying the manager of the CE team and a second manager for consulting services
  - Formally connecting existing staff doing this work to work with a coordinated statewide approach.
  - Establish service metrics and data gathering
- Information learned from formalizing teams and establishing metrics and data gathering will inform needed approach to adding more staff.

Resource Libraries
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- Recommendation #1 – contracting for services from libraries continues as needed regionally and statewide
- Recommendation # 2 - Research need for a single state resource public library and based on information gathered develop model details.

Startup infrastructure needs and costs

<table>
<thead>
<tr>
<th>Delivery</th>
<th>None.</th>
</tr>
</thead>
</table>
| ILL\ILS | • Incentives for larger ILS regions  
• Some place to collect what’s happened with other consolidations  
• Funds for out-of-state ILL shipping: $40,443 annually |
| Technology | • Year 1: Helpdesk ($9,000)  
• Year 2: Begin building network ($320,000), data center ($387,000), Helpdesk ($9,000)  
• Year 3-5 are the same (per year): Continue to build network ($320,000), data center maintenance ($168,720), Helpdesk ($9,000), inventory software ($10,000) |
| Collections | Electronic resources: Possibly baseline collection of resources, no amount specified. Digital collections:  
| | • Hardware startup costs for centralized scanning center: $137,657-$262,657  
| | o Are recommending inventory of existing equipment as part of planning  
| | • Software startup costs for scanning center: $739 plus an annual subscription ranging from $720 to $899.  
| | • Hosting/access/preservation: 2 options ranging from $36,518 to $64,000 for initial setup/first year.  
| | • Startup costs for traveling kits: $12,000 per kit. $1,500 for replacement of equipment (for traveling kits especially)  
| Consulting/CE | • Portal and Learning Management System (LMS) – cost TBD  
| Resource Libraries | • Dependent on results of initial implementation action for Recommendation #2  

### Startup staffing needs and costs

| Delivery | 0.5 statewide delivery service coordinator position at $45,000 per year.  
| ILL/ILS | 2 co-directors to work on these early implementation steps. $171,072 annually  

| Technology | Year 1: CIO ($152,422); Senior Network Engineer, Desktop and Systems Director, and Customer Relations Director after six months ($176,659). Contracted technologists ($200,000).  
| | Year 2: Same as year 1 but for full year ($707,740), with the addition of the Procurement Officer ($96,000).  
| | Year 3: Year 1-2 staff plus contracted staff ($803,740). Add regional managers, network and desktop/system department staff ($1,006,374).  
| | Year 4: Add more regional support. Total existing staff costs and contract staff: $1,810,114. Add some help desk liaisons and support technicians ($500,000) and consultants ($249,600).  
| | Year 5: Service is fully staffed and contracted work no longer needed. Total existing staff: $2,359,714. Add more help desk liaisons and support technicians: $1,103,994.  

| Collections | Did not specify. Recommending planning as first step of implementation for both electronic resources and digital collections.  
| Consulting/CE | • Will depend on how implementation is determined to identify initial managers.  

<table>
<thead>
<tr>
<th>Resource Libraries</th>
<th>• Dependent on results of initial implementation action for Recommendation #2</th>
</tr>
</thead>
</table>

**Pilots/research/proof of concept**

<table>
<thead>
<tr>
<th>Delivery</th>
<th>The phased implementation approach allows for proof of concept and model adaptation.</th>
</tr>
</thead>
<tbody>
<tr>
<td>ILL\ILS</td>
<td>Research... ...policy and governance issues and solutions ...needs and roles for centralized staff ...collecting info from those who have consolidated before.</td>
</tr>
<tr>
<td>Technology</td>
<td>None defined</td>
</tr>
</tbody>
</table>
| Collections | Electronic resources  
• Recommend planning as the first step of implementation 
• Could include data gathering to learn which products are requested most frequently and developing top priorities for model implementation based on this feedback. 
• Determined the following as highest priorities for implementation:  
  o Centralized negotiation of contracts, discounts and group pricing; easy access to pricing and quoting  
  o Centrally managed product trials and evaluation  
  o Centrally managed authentication |
| Digital collections | • Recommend planning as the first step of implementation 
• Could include assessment of projects, identification of location, inventory of existing equipment available, determining existing training materials and policies. 
• Determined the following as highest priorities for implementation:  
  o Centralized reformatting of content  
  o Centralized creation, consultation, and training on metadata and software  
  o Centralized hosting and access platform |

| Consulting/CE | • Many models currently exist of collaboration to provide CE and consulting across the state. 
• Implementation to increase staff levels will be based on assessment of service metrics to identify need and priorities across the state. |
| Resource Libraries | • Research process needed for Recommendation #2 |