Contents

Project Overview .................................................................................................................................................. 3

Directives Gleaned from the Library Community through the Recommendation Development Process .................................................................................................................................................. 8

Recommendation 1 - CE Portal .......................................................................................................................... 10

  Recommendation ............................................................................................................................................... 10
  Summary ......................................................................................................................................................... 10
  Value Proposition .......................................................................................................................................... 10
  Suggested Implementation process .................................................................................................................. 10

Recommendation 2 - Evaluate Funding Distribution ....................................................................................... 16

  Recommendation ............................................................................................................................................... 16
  Summary ......................................................................................................................................................... 16
  Value Proposition .......................................................................................................................................... 17
  Suggested implementation process .................................................................................................................. 17
  Measuring Success ......................................................................................................................................... 18

Recommendation 3 - Exploring the Possibility of Delivery Pilots .................................................................... 19

  Recommendation ............................................................................................................................................... 19
  Summary ......................................................................................................................................................... 19
  Value Proposition .......................................................................................................................................... 19
  Suggested implementation process .................................................................................................................. 19
  Measuring Success ......................................................................................................................................... 21

Recommendation 4 - Investigate Discovery Layer ............................................................................................ 22

  Recommendation ............................................................................................................................................... 22
  Summary ......................................................................................................................................................... 22
  Value Proposition .......................................................................................................................................... 22
  Suggested Implementation Process .................................................................................................................. 23
  Suggested funding sources ............................................................................................................................... 23
  Measuring success ........................................................................................................................................... 23

Recommendation 5 - Reduce the Number of Systems ...................................................................................... 25

  Recommendation ............................................................................................................................................... 25
  Summary ......................................................................................................................................................... 25
  Value Proposition .......................................................................................................................................... 25
  Suggested Implementation Process .................................................................................................................. 26
  Funding Sources .......................................................................................................................................... 26
  Measuring Success ......................................................................................................................................... 26

Recommendation 6 - Develop System Standards, Best Practices, and Accountability ............................... 28

  Recommendation ............................................................................................................................................... 28
Project Overview

At their meeting in August 2012, System and Resource Library Administrators Association of Wisconsin (SRLAAW) decided to conduct a summit and subsequent survey to examine how library systems could continue to most effectively deliver services to their member libraries. This action was largely in response to shrinking governmental budgets and consolidation of public library systems in other states throughout the nation. The subsequent report, *Creating Effective Systems*, recommended a need to conduct further studies on library system services, size, and strategies for implementing optimally configured systems and establish service and administrative standards for public library systems.¹

During the development of the 2014-2015 biennial budget, the Joint Finance Committee recommended the Department of Administration analyze library systems to “conduct a study to identify potential savings in public library systems through consolidation, technology, efficiencies, LEAN practices and service sharing” in consultation with the Department of Public Instruction (DPI). This recommendation was deemed unnecessary and vetoed by the Governor, who acknowledged DPI is the appropriate agency to conduct such a study without legislative directive.²

In response, DPI’s Division for Libraries and Technology initiated a Lean System Study Work Group to examine demand for services by member libraries and the resources and capacity of public library systems to provide these services. This work group identified areas of service provided by library systems that could be made more efficient. The major recommendation was that study continue and experts from each topical area be tapped to develop further recommendations and implementation strategies.³

The Council on Library and Network Development (COLAND) then appointed a workgroup in July of 2014 to develop a strategic vision for library systems in the 21st century. This workgroup presented a series of recommendations to State Superintendent Tony Evers in January of 2015⁴:

- Library Consulting - Leverage distributed expertise to provide specialized consulting, verified by DPI;
- Provide and Support Technology Access through aggregation of software and services including shared platforms and expertise;
- One State, One Collection;
- Resource libraries must redefine their value proposition for the twenty-first century;
- Delivery Service - Transition to multi-hub delivery network;
- Coordinate Electronic Resources - Maximize purchasing power;
Continuing Education - Maximize impact of continuing education funding

Eliminate statutory language requiring Department of Public Instruction (DPI) to request 13% for library system aid.

COLAND included a road map and timeline with their recommendations to further study how public library systems could most efficiently and effectively deliver services in the topic areas identified by the Lean System Study Work group. The intent was to lead change at the local and regional level to maximize organizational resources and state funding in order to deliver the highest quality library services to Wisconsin residents for the tax dollars provided.\textsuperscript{5}

In September 2015, the State Superintendent appointed an 11-member steering committee to oversee a multi-year project to re-envision how Wisconsin Public Library Systems serve Wisconsin’s 381 public libraries. Membership was selected based upon library and system size as well as consideration for geographic distribution.

Members of the Steering Committee:

- John DeBacher - Director, Public Library Development
- John T. Thompson - Director, Indianhead Federated Library System
- Stephen R. Ohs - Director, Lakeshores Library System
- Paula Kiely - Director, Milwaukee Public Library
- Bridget C. Christenson - Director, Hatch Public Library (Mauston)
- Beth A. Carpenter - Director, Kimberly-Little Chute Public Library
- Kristie L. Hauer - Director, Shawano City-County Library
- Kent A. Barnard - Director, Patterson Memorial Library, Wile Rose
- Jessamyn C. Lee-Jones - Director, Platteville Public Library
- Bryan J. McCormick - Director, Hedberg Public Library, Janesville
- Jon M. Bolthouse - Director, Fond du Lac Public Library
The Steering Committee was charged with providing strategic vision, oversight, and general leadership in the development of recommendations to update and refine the roles and services of Public Library Systems and maximize the public investment in library systems and public libraries.

The Steering Committee, as well as all workgroup members, were made up of volunteers who had other full time jobs. Recognizing this, the Steering Committee issued a Request for Proposal for a project manager to plan, organize, and implement a process focused on eliciting recommendations from the library community. The project manager was also charged with facilitating meetings and structuring the idea generation of the workgroups. One response was received. WiLS was selected as the project manager during a Steering Committee meeting held in October during the 2015 Wisconsin Library Association’s Annual Conference. The following core principles were adopted by the Steering Committee in December 2015:

- 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 outcomes;
- The process will be used to grow skills needed to maintain flexible and community-driven service into the future.

Workgroups were formed in March of 2016. Members of the workgroups were selected from a pool of voluntary applicants. These members were assigned to workgroups based on their subject matter expertise or their status as a user or customer of a service area. Ultimately, the following 7 workgroups were formed:

- Chapter 43
- Collections
- Continuing Education/Consulting
- Delivery
- ILL/ILS/Discovery
- Resource Libraries
● Technology

These workgroups were instructed to research their service area extensively and meet regularly to develop recommendations to the steering committee for inclusion in their final report. Workgroups were also instructed to identify, illustrate and contextualize existing inequities in library service throughout the state and to focus on maximizing equity of access for the citizens of Wisconsin, not the libraries or the Systems.\(^8\) As workgroups developed their recommendations, feedback was solicited from the library community in a number of ways, including: an external group of participants tapped to review findings through surveys, presentations made at the 2016 and 2017 Wisconsin Library Association’s annual conference, monthly calls scheduled with SRLAAW, and virtual question and answer periods open to the public.\(^9\) Communications liaisons were also identified in each system to help disseminate information to member libraries and library boards. Final reports from each workgroup were delivered to the Steering Committee on April 2, 2018.\(^10\)

After the completion of the workgroup phase, WiLS transitioned from an active project manager role to an administrative and logistics coordinator role. The role of facilitation meetings and the decision making process was awarded to Russell Consulting through a bid process.

The Steering Committee reviewed workgroup recommendations independently, as well as more formally at two in-person retreats in February and April of 2018. During these retreats, two groups of collaborators outside of the committee were identified to help craft a final report.

10 library professionals were selected to be Core Recommendation Collaborators (CRC) was created and worked with the Steering Committee on developing and testing overarching models of governance that could accommodate the workgroup report recommendations. This work was facilitated by Russell Consulting and took place during two all day meetings.

The findings of this work was shared with the library community and officially made available for public comment from June 11 to July 20. All public comments were compiled by WiLS and made available to Steering Committee and CRC members.

A Model Recommendation Summit was held July 30-31 with XX participants joining the Steering Committee and CRC members to further test and discuss the model of governance. At the conclusion of the Summit, XX areas of consensus were identified.

The Steering Committee reconvened in person on August 16, to discuss the outcomes of the Summit and to begin to form concrete recommendations. Steering committee members were individually tasked with drafting concrete recommendations for review by the larger committee.
[THIS IS WHERE THE MAIN PROBLEM STATEMENT(S) IDENTIFIED BY ALL THE PREVIOUS REPORTS, COMMITTEES AND PROCESSES SHOULD GO]

- Chapter 43 is outdated and needs to be updated
- SRLAAW report – Creating Effective Systems
  - Modernize resource library statute language
  - Eliminate statute language requiring planning with other types of libraries
  - Collect and document collaboration activities happening between systems
  - Conduct a study aimed at determining optimal system size and strategies for implementing optimally configured systems.
  - Conduct a study of regional integrated library system (ILS) consortia to investigate the advantages, efficiencies, disadvantages, and potential barriers to larger ILS consortia.
  - Establish service standards for public library systems
  - Establish administrative standards for public library systems
  - Investigate how systems are governed in other states and to make recommendations for changes in the governance of Wisconsin public library systems

- DPI Lean System Study Work Group
  - COLAND work group and DLT staff continue as the System Services Redesign Steering Committee (SSRSC)
  - A project manager should be hired to work with the SSRSC to aid the process and ensure the work of exploring and implementing alternative service delivery models is thoroughly executed and is both inclusive and transparent
  - Work groups should be formed to explore and redevelop service delivery models of services currently provided by public library systems.
  - Incentivize consolidation of services to be delivered in a coordinated manner either regionally or centrally.
  - Develop Standardized Regional Service layers for improved Delivery, IT, CE and Consulting. Allocate appropriate fiscal resources to support regional layers of service
Directives Gleaned from the Library Community through the Recommendation Development Process

The process of developing the recommendations contained in this report was robust. A wide range of stakeholder groups were consulted for feedback. Library directors, library staff, system directors, system staff, library and system board trustees, county officials, as well as past and present DPI officials were all involved in the process. Large amounts of project documentation were made available to these stakeholder groups, and feedback was received from individuals and boards at the library, system and county levels. The Recommendation development process culminated in a summit-style meeting, followed by a final public comment period on the content derived from that summit. The amount of feedback received by the Steering Committee was both significant and prescriptive. An effort was therefore made to distill key directives expressed by the community at-large.

Service improvements must benefit library patrons.

Wisconsin public libraries and systems have a strong history of working together to provide excellent services. One of the Principles of the Process is to “ensure all Wisconsin public libraries have the capacity to provide equitable access to excellent library services regardless of the race, ethnicity, income, gender, or employment status of the people they serve, or their location within the state”. Any service improvements moving forward must fulfill this principle and ultimately benefit the end-user, the library patron.

Workgroup reports should be used as frameworks for specific service improvements.

The Workgroups consisted of service experts from across the state. The studies they completed of current service areas were thoughtful and in-depth. Inequities were examined, which led to recommendations for improving service. Upon review by the library community, several Workgroup recommendations garnered early support for service improvements in specific areas: delivery, discovery layer, technology, and the creation of a CE portal. The Workgroup reports provide a solid foundation for moving forward in these areas.
Take action now on recommendations with robust support.

The specific areas mentioned above represent areas of greatest need for libraries; areas that would provide immediate, positive impact on service to Wisconsin residents. With the Workgroup reports serving as frameworks for improvements, action must be taken quickly and purposefully. Some of the Workgroup recommendations require more significant changes in order to affect service improvement. For example, state-scale implementation of a service such as technology would require changes to governance structures, funding, administration, and would require widespread support from the library community. It became clear throughout the Recommendation Development Process that organic, non-mandated change should lead improvements forward.

Service improvements must be soundly-implemented.

Implementation of service improvements must be driven by effective research, planning, execution, and change-management. Implementation should also be supported by adequate resources. The library community expressed concerns about how administration, funding, and governance might change with proposed service improvements. Any service improvement moving forward must have a well-developed plan for how it will be managed, who will govern the service, how it will be implemented, how local relationships will be maintained or developed, as well as evidence of how efficiencies will be gained.
Recommendation 1 - CE Portal

Recommendation
The PLSR Steering Committee recommends the Department of Public Instruction oversee the creation of a Continuing Education (CE) Portal.

Summary
A CE portal is a State-wide content management system which includes components for tracking CE classes, validating credits and maintaining Library staff certifications. Additionally, a CE portal provides educational resources including online CE courses, webinars and a master calendar identifying available CE opportunities throughout the State.

Value Proposition
In today’s fast paced and diverse world, ongoing training is required for Library Director certification and for Library staff to best serve the changing needs of Wisconsin residents. A web-based portal provides all library professionals and trustees information about and access to the same amount, level and quality of CE opportunities.

Suggested Implementation process
1. Appoint a project manager and/or small task-force of existing CE consultants to drive the project
2. Collaborate with DPI staff to evaluate existing content management tools
3. Use expertise from existing CE staff and consultants to identify appropriate content for the portal and recommend the ideal structure of the portal.
4. Create specifications for the portal and release a RFP?
5. Project manager will work closely with DPI to ensure relevant, timely and credible content is added to the portal
6. Project manager will maintain content and accessibility on the portal
Measuring Success (measurements to be added into a narrative)

1. Highly skilled trained Library professionals
2. Certification compliant
3. Variety of topics, responsive, meeting fast changing needs of staff and trustees
4. Increased collaboration between existing CE consultants (# of in person meetings?) not siloed

Where would it be?

The CE Portal can be stored virtually anywhere that a server is located. The State of Wisconsin/DPI has server storage available, or it could be housed at a Regional Data Center like the one at CVTC (Chippewa Valley Technical College).

Who would be involved?

Content for the CE Portal would be provided by existing CE Coordinators throughout the state, who would update with new courses, webinars, and other information for the portal. DPI staff will work with CE Coordinators to provide content in support of statewide initiatives.

Support on the technical end would be provided by the server host. They would maintain the server equipment and provide troubleshooting assistance when necessary.

The manager of the CE Portal will also work closely with DPI to ensure that the content available through the portal is creditable. The idea is that library staff should be comfortable knowing that the courses offered through the portal have been vetted by appropriate personnel, offer effective and timely content, and will count toward the appropriate accreditation.

The manager of the CE Portal will also be in charge of making sure that content stays current, adding new courses and information as appropriate and removing any courses that did not meet expectations or were found to be irrelevant. In addition, the manager may also assist.

Not sure what to do with the below content. These are all specs of a portal
What are the components?

An important feature of the CE Portal is a calendar of CE activities available throughout the state. Having one source for CE opportunities creates a one-stop-shop where staff can see what opportunities are available locally, regionally or even statewide. For example, a course may be offered one afternoon in one city and another afternoon in another city. It will also note whether or not the session will be recorded and archived for later viewing by the staff member. The number of CE credits/hours available for participating in this course will also be listed.

If a course is offered strictly as a webinar it will list the date and time the webinar is to be offered technology needed to view the webinar, and when it will be archived or available for viewing at a later date. As with in person CE opportunities, the credits/hours for a webinar will also be listed with the course offering.

An effective tool of the CE Portal will be automatic tracking of courses taken by the staff member. As each staff person will have their own unique log in, courses taken by that individual will be stored and maintained. For many staff, including library directors, this information can be forwarded or printed out to verify attendance and participation in these courses. For directors it will be helpful for maintaining certification with DPI, and for staff members who aren’t directors the courses may be helpful for promotions within an organization, merit reviews, or when applying for a position at another library.

When an individual takes a course offering through the CE Portal, their profile is updated and shows their attendance at the event. If it is a live event, the instructor will submit information verifying attendance at the session. If it is a webinar the profile will be updated following completion of the webinar. As courses are completed the profile is updated and build a portfolio of all the work completed by the user.

For those who are attending conferences or other CE training events, including those offered by a county or municipality, those CE events may also be added to an individual’s profile. These are typically course offerings that may not be made available through the CE Portal, but can still be tracked and added to the users profile for ease of tracking. Verification of what was attended or taken would be submitted to CE staff and once verified the course information will be attached to the user profile.
Courses that are offered by CE Coordinators will be authenticated or approved by DPI. Requirements of certification will also be validated by DPI. When a participant takes a course offered offsite by a university, trainer, consultant, city staff, etc., information will be submitted and validated by CE Coordinators and the appropriate CE credit added to the individual's profile.

CE is becoming even more important

Website
As noted previously, servers available either through DPI or a regional data center would be able to host the CE Portal and website. The website would simply be the access point for getting to the information provided by the CE Portal. Technicians from the server host site would be responsible for maintenance of the equipment and would help troubleshoot technical problems. CE Coordinators would be responsible for content management and training of how to use the CE Portal.

Website Content
As noted before, the CE Manager will oversee the CE Portal, but all CE Coordinators will help provide content for the CE Portal. Working together, they will provide timely updates to the Calendar; they will make sure the webinars that are recorded are archived correctly and available for viewing at a later date; they will organize the recording of programs; they will identify how much credit a course will be worth and noting that on the course information page; and they will work to familiarize themselves with librarians in their region who are skilled and can present courses for CE credit.

CE Coordinators would also have access to a list of “their” librarians with a running total of Credit hours earned to date. This will allow for relationships to be built between library staff and the CE Coordinators so that the two can work together to make sure that they are taking appropriate classes or at least know when appropriate classes are being offered through the CE Portal.

Create and Maintain Log-in Information
In order to access the CE Portal users will have to Log-in and create a profile. These profiles should be able to be created by the user, but be verified by the CE Manager before becoming active. The CE Manager will verify the level of access for the user.
In addition to the creation of profiles, there should be a feature that allows for a report to be run that will show all the courses taken under that profile. This will allow for effective and efficient tracking and reporting of coursework taken to DPI or any other reporting body.

Secure Access to portal

Access to the CE Portal will be on a tier-based security system. The following are proposed levels for log-in access:

1. DPI/Regional Data Center Staff for Server Maintenance and Software updates – Admin Level 1
2. DPI Staff – licensing verification; content verification – Admin Level 2
3. Regional/System CE coordinator – Admin Level 3 – calendar access; archive access (admin type); Uploading content; check requests for CE hours; Librarian Grid.
4. Wisconsin Librarians User Level 1 – access to portal to sign up: view content; check CE credits; submit CE requests
5. Wisconsin State Teachers User Level 2 – Access and cross-training CE credit hours as applicable and determined by DPI
6. Out of State Librarians: User Level 3 – view content
7. General Public User Level 3 – view content

What is the CE Portal?

The CE Portal (hereon known as the Portal), is an online portal accessible by any librarian in the state to assist in fulfilling and tracking Continuing Education hours necessary to stay current with the Department of Public Instruction (DPI).

The Portal will be an integral part of the DPI continuing Education certification program, currently librarians must earn 100 contact hours of certification credits for their license, every 5 years.

Why Is the portal necessary?

Currently, each librarian in the state must write or type a CE Form for every class. Each form is saved for the end of the year, when they are tallied and sent in to their system CE person who validates them and approves the hours, sending a form to DPI. This creates a lot of wasted time.

In many cases, and in most cases in small libraries, this creates a hardship, both monetarily and in time spent, as small libraries may have only one person working, and that person must still maintain their license, order media. Pay bills and perform all the duties of the Library Director.
The Process

Library director logs on to the Badger Sett Learning Portal. Their name has been submitted the day they are hired and entered into the access permitted database by the Regional/System CE Coordinator

- Step 1 – Set up account with Library Name, Size, Certification Level
- Step 2 - Browse calendar for CE ops T
- Step 3- Watch material
- Step 4- Take a short quiz/write a paragraph about the training
- Step 5 – System adds CE hours to file
- Step 6 – At year’s end – Librarian submits a request through the portal to submit CE Credits for review OR CE credits are automatically sent to CE Coordinator for that librarian.
Recommendation 2 - Evaluate Funding Distribution

Recommendation

The Steering Committee recommends the Department of Public Instruction Superintendent appoint a study group to oversee an analysis the current funding formula in 43.1(a) and to explore alternative mechanisms for fund distribution to ensure equity of system services to Wisconsin public libraries, while concurrently requesting an increase in state aid for library systems from the state legislature and prioritizing State Aid to fund statutorily mandated system services.

Summary (Key points to place within a narrative; not necessarily in the order listed)

1. Disagreement exists about the appropriateness and fairness of the current funding formula
2. A proposal was made during the PLSR process to change State Statute to improve equity of funding.
3. No authoritative or independent analysis of the proposal was undertaken.
4. One Project Principle states that systems and libraries should be held harmless as much as possible, (i.e. No system will lose funding due to a formula change). This principle must be considered in the analysis.
5. There was agreement that more study and exploration is needed in this area before recommending any change.
6. The funding formula was developed over 30 years ago and includes three (3) factors: local expenditures, territory, and population.
7. The Department of Public Instruction provides a clear explanation of the formula and changes since its inception at https://wilibrariesforeveryone.blogspot.com/2015/05/calculating-state-aid-to-systems.html
8. Libraries have changed significantly since 1972, library populations have changed, and the demands for service from the community have grown.
9. State aid calculations are convoluted, up to 30 years old, and use data from at least 17 years ago. The formula was last utilized and a “freeze” imposed in 1998 (?), and any
increases to state funding since then have been distributed proportionately, without a recalculation of the formula.

10. The current formula places a high value on population such that Systems located in densely populated areas receive a significantly larger level of funding than systems made up of primarily rural counties, single-county systems, or any system with a smaller service population.

11. This method of funding distribution can create inequity in the services a system can provide to its libraries. For example, South Central Library system serves 54 libraries and receives nearly $2 million in State aid—13.7% of the entire State Aid. Conversely, Indianhead Federated Library System serves a nearly identical number of libraries (53) that require the same services provided to the South Central libraries, yet receives half of what South Central receives, around $1,125,000. Although the libraries in the seven counties in South Central serve a greater number of patrons than Indianhead, there are several fundamental services that any library—large or small—must provide to their users.

12. Since a goal of the PSLR Project was to improve the equity of service, factors of inequity such as poverty, unemployment, and infant mortality rates, should be considered for inclusion in any new formula.

Value Proposition

1. A thorough and independent analysis of the current State funding formula and other proposed substitute formulas will provide a solid foundation for decision making.

2. To ensure every Wisconsin resident has an equity opportunity to benefit from library services, funding must adequate support the needed services Systems provide.

3. System funding has a direct impact on the local libraries’ ability to provide quality services to its patrons. The better funded systems are, the better library patrons will be served.

Suggested implementation process

1. DPI Superintendent to appoint task force to oversee the study of the current and alternative funding strategies and recommendations.

2. DPI Assistant Superintendent to assign Project manager from the Division to support the work of the task force.

3. DPI identifies funding any needed consulting costs.

4. A third party consultant is hired to analyze current funding formula and potential alternatives.
5. Recommendation is delivered to Superintendent based on the outcome of the analysis and its adherents to the goals of equity and holding systems harmless.

Measuring Success

Success will be measured by 1) the quality of the final recommendation and the rigor used in its development; 2) the level to which equity is achieved while holding systems financially harmless; 3) and, the ability for Systems to meet Standards effectively.
Recommendation 3 - Exploring the Possibility of Delivery Pilots

Recommendation
The PLSR Steering committee recommends that the Superintendent of the Department of Public Instruction explore a Library delivery service pilot project in order to prove concepts on a small regional scale and over time serve as a starting point toward implementing a Statewide delivery network.

Summary
In order to provide more equitable delivery service to all regions of the State, to realize efficiencies of time and miles traveled and to realize cost savings by eliminating duplications of effort, a restructuring of Library delivery services is needed. Additionally, other coordinated services, including technology, rely on efficiencies gained from establishing fewer service regions and providing daily delivery between regions.

The two key components of the Delivery workgroup model toward which we are moving are
1. eight delivery regions and
2. a single hub location in each region serving as the connection point to the other regions.

Supporting a pilot delivery project will provide opportunities to demonstrate effectiveness of the new delivery regions, while also allowing for trial and error with little impact to library patrons.

Value Proposition
Delivery services provide a vital support role to statewide resource sharing. Reducing the number of delivery regions to create regions of more uniform size geographically in Wisconsin will move delivery services toward a more equitable distribution of resources. Fewer delivery regions also improves services, ensures the possibility for libraries to receive delivery every weekday they are open and creates a system of moving materials between regions that is uniform and efficient, throughout the state.

Suggested implementation process
1. Hire a project manager and form /appoint small task-force to oversee implementation of a pilot service model.
2. Work with systems in specific identified regions to coordinate development of the new regional service model and establish a single hub for connecting to other regional hubs as described in the delivery workgroup report.

3. Targeted development of a few regions to establish initial core statewide hub connections between regions in the south and north of the new model

4. Using an incremental implementation process, measure the feasibility of the new model through data gathering, cost analysis and determination of standards.

5. A hybrid approach of contracted vendors and in-house delivery operations is needed for a stable delivery service.

6. Any competitive bid processes will not make final decisions of service providers based on cost alone. The average per stop costs that currently exist in the state is essentially equal between the systems utilizing a contracted delivery service and those operating an in-house service. A balanced approach to maintain service stability can be done in a way that is also most cost effective.

The following map shows the recommended eight regions model and possible hubs (starred on the map) in each region. While the delivery hubs during implementation will likely coincide with existing system or vendor locations in some regions, delivery hubs in this model are not fixed long-term as the potential for changing vendors through a competitive bid process may impact where a delivery hub is located.
Measuring Success

A successful delivery pilot project will create efficiencies throughout the regions by reducing duplications. Fewer miles traveled, faster and/or increased delivery stops, and measured reduction in cost per stop will all demonstrate success. Additionally, the pilot begins to build equity in library delivery service around the State.

The recommendation is a pilot so is success the process of simply starting, identifying challenges and then making adjustments?

SCLS Delivery

The statewide delivery network exists due to the South Central Library System’s work to establish it beginning in the early 1990’s. As the statewide delivery service has evolved and grown, it required SCLS to locate to a sufficiently sized facility for the service’s headquarters and develop an internal management structure to support both the statewide service and SCLS’s delivery service to its member libraries. A portion of SCLS overhead costs for the facility, management and other administrative overhead has been factored into the costs for statewide delivery participation.

The model ideally sees the regional and the statewide regional hub connection model funded and coordinated as a single statewide delivery service. This is a significant change from the current model and will not occur immediately. The transition is recommended to be phased in over the first five years. A good portion of the SCLS Delivery overhead costs will not be reduced in the same proportion as any reduction in revenue to SCLS as the new model is phased in. Thus, there will need to be careful consideration of the impact on SCLS as any funding model changes take effect during implementation.
Recommendation 4 - Investigate Discovery Layer

Recommendation

The PLSR Steering Committee recommends that the Department of Public Instruction engage with topical experts, regional public library systems, and the library community at-large to create an effective, well-managed, state-scale library discovery layer.

Summary

A discovery layer refers to the visual interface used by library patrons to find, identify, select, and obtain the various types of resources offered by the 21st century public library. Throughout the entire PLSR process, the concept of a unified, state-scale discovery layer has maintained a robust degree of support from project participants, the library community, and other stakeholder groups. These resources include physical books and audiovisual materials, as well as an ever-broadening variety of downloadable and streamable digital resources such as audiobooks, feature films, news and/or scholarly articles, and other digital content. The ultimate goals of this recommendation are to:

1. Create the technical coordination necessary for a variety of library management software platforms to become interoperable;
2. Create a single powerful search interface that allows patrons seamless access to library collections across the state regardless of where they live and;
3. Generate cost savings to Wisconsin’s regional library systems which can then be repurposed to further enhance service offerings to member libraries.

Value Proposition

Wisconsin libraries already lead the nation in regard to sharing resources. However, the set of technologies relied upon to accomplish this are aging. Creation of an effective, well-managed discovery layer at state-scale would mean the following:

- Library patrons may search the collections of any public library in the state and obtain rich, detailed and vibrant results that are optimized to achieve the shortest delivery time based on their geographic location.
- Library systems that do not have the resources to afford or manage “cadillac” library management software would have access to it, dramatically increasing the baseline patron experience.
- Facilitating interoperability between the patchwork of regional implementations of library management software would open up a significant new collaboration space,
removing a barrier to new partnerships and freer communication between libraries outside of system silos.

Suggested Implementation Process

In order to achieve the underlying goals of this recommendation, the following process (or some version thereof) is advisable:

1. Hire or appoint a project manager and/or small task-force vested with the ability to drive the project;
2. Conduct a needs assessment to identify a message protocol or communication framework;
3. Ensure that all major library software vendors doing business in Wisconsin support the chosen protocol or framework;
4. Secure software development resources necessary to create an application capable of translating action messages between various library management systems;
5. Explore the current capabilities of library software vendor discovery products, including open-source platforms;
6. Conduct a fiscal assessment to determine costs when scaled to the entire state;
7. Organize a process to evaluate and select a product that will serve as the state-scale discovery layer;
8. Create a structure for ongoing evaluation and improvement.

Suggested funding sources

Measuring success

*Initial thoughts:*

1. Process results in greater understanding of commonalities/differences between ILS products;
2. Process results in a tangible discovery layer option that is an improvement in service quality while more cost effective (generates an offset which a library system can put toward improving or introducing another service);
3. Process generates opportunities to implement best practices (governance, policy convergence, etc.).??
Funding related
Need to brainstorm on this. Current thoughts include:

1. System $$
2. LSTA Grants to States Program $$
3. LSTA Dedicated Project Grant $$
4. Other Grant $$ - Private foundations or organizations with a government efficiency or public good focus.
5. Coalition - systems commit $$ voluntarily, add to this LSTA grant $$, federal LSTA opportunity? It’s certainly a large project worthy of transformative stimulus.

Residual Thoughts & Questions:
- Where does governance fit in? Example: advisory group concept to handle reevaluation of vendor if necessary, governance, etc.
- Staffing issue. How will this be handled? Possible to administer a state-scale platform with only a couple of FTE’s and rely on coordination/cooperation/crowdsourcing with regional systems as key player/stakeholders??
Recommendation 5 - Reduce the Number of Systems

Recommendation
The PLSR Steering Committee recommends that the current number of regional public library systems - with emphasis on the Southeastern corner of the state - be reduced through a well-engineered consolidation process.

Summary
A patchwork of sixteen regional public library systems provides services to public libraries in Wisconsin. Many of these services -delivered at scale- are now relied-upon and save libraries hundreds of thousands of dollars on an annual basis. Since the passage of the legal framework allowing formation in 1971, systems have each evolved differently. Counties are the basic geographic building blocks for systems, thus systems range in size from eleven counties, to single counties. Over a number of recent years, consensus has been growing among the library community that a strategic reduction in the number of regional systems (through consolidation) would help address service capacity issues. Adding to this consensus are a number of key reports by stakeholder groups, each insinuating potential service improvements resulting from a strategic reduction. These reports include:

- “Creating More Effective Public Library Systems” (2013/SRLAAW);
- “Lean System Study Work Group Recommendations” (2014/DPI)

In addition to the above reports, the concept of a well-engineered strategic reduction in the number of library systems was a key recommendation sent to the PLSR Steering Committee with a highly robust degree of support from the participants in the PLSR Recommendation Summit.

Value Proposition
There are some areas of the state where there is great potential value to be gained from a reduction in the number of systems serving those areas. Achieved through consolidation, it is clearly possible that a smaller number of slightly larger multi-county federated library systems would be able to furnish member libraries (therefore also patrons) with a higher quality, more comprehensive set of services than most single-county library systems are able to provide.
Suggested Implementation Process

In order to achieve the underlying goals of this recommendation, the following process (or some version thereof) is advisable:

1. DPI should provide adequate resources and full support for implementation of recommendation #7 “Using Incentives to Drive System Mergers”;
2. Project manager and/or small task force established to undertake the process;
3. Remove statutory barriers to library system mergers;
4. Document and share best practices for library system mergers;
5. Staffing changes, changes in leadership, etc. Consider consolidating through attrition;
6. Engage DPI consulting when system director position is vacated to explore consolidation opportunities;
7. Encourage Library Systems with 3 or fewer counties first;
8. Incentivize ILS mergers.

Funding Sources

Measuring Success

The following are suggested methods by which outcomes may be assessed:

1. A comparison of the list of services available to a member library of a single-county system pre-consolidation versus the list of services available to that same library after consolidation;
2. A comparison of response times pre and post consolidation from the time a service is requested to the time the service is satisfactorily delivered (examples: resolution of IT help desk tickets, library consulting call-back times);
3. A comparison of the net funding available via the system to member libraries pre and post consolidation.

In recent years, discussion and research into the viability and benefit of reducing the number of Wisconsin’s public libraries systems has been prevalent. Several papers by varying state groups have addressed this topic, all hitting upon reducing duplication of services and/or identifying savings through consolidation. Additionally, attention has focused on improving or maintaining system services, with clear effort not to diminish services. The target throughout has been to deliver high quality services to Wisconsin residents for the tax dollars provided.
SRLAAW’s final report “Creating More Effective Public Library Systems”, dated August 2013, recommended a study to determine “optimal size” of a library system. Through their process, SRLAAW identified that “the library community believes that having fewer public library systems in Wisconsin is inevitable.” Determining optimal size, however, has become elusive.

The study was to address four elements:

- The study would identify potential savings in systems through consolidation, technology, efficiencies, Lean practices, and service sharing.
- The library community would be involved in studying the relationship between system effectiveness and system size in order to determine the factors that define optimal system size.
- Outside experts (e.g., regional planners) would be asked to suggest strategies for implementing optimal system configurations given the optimal system size, the current configuration of systems, and demographic patterns in the state.
- The system funding formula would be examined in light of optimal system size and configuration to determine how it could be altered to incentivize change.”

Suggestions stemming from the DPI-sponsored “Lean System Study Work Group Recommendations”, from 2014, determined potential savings through:

- “Consolidating systems
- Increasing the use of technology
- Reducing duplications and inefficiencies
- Utilizing Lean production principles
- Increasing the sharing of services among library systems”

In addition, COLAND’s report “Strategic Vision for Library Systems in the 21st Century” dated 2015, also addressed the number of public library systems in an effort to reduce duplication, primarily regarding administrative services. Furthermore, emphasis has been placed on maximizing resources available to libraries and systems through Lean principles and increasing the use and capabilities of technology.

, [groups] have all come to the conclusion to reduce the number of systems in Wisconsin. This was also a theme coming out of the PLSR Recommendation Summit. Workgroup service models pointed to larger regions of service for all topic areas. The Funding Subcommittee also found economies of scale with reduction of duplication
Recommendation 6 - Develop System Standards, Best Practices, and Accountability

Recommendation

Immediately appoint a task force to identify and establish mandatory system standards to ensure equitable delivery of services to member libraries in all parts of the state.

Create a formal mechanism for library systems to define best practices outside of system standards and make those best practices available to all library systems in the state.

Summary

Library systems are required to provide a full range of services per Wisconsin State Statute 43.24 to qualify and maintain its eligibility to receive state aid. The purpose of standards for Wisconsin public library systems and system staff is to encourage the further development of quality service by providing public library systems with a tool to identify strengths, recognize areas for improvement, and strengthen accountability to member libraries. It could be unlikely that all systems would meet these standards with current state funding. Instead, system may collaborate and/or consolidate in order to provide the level of service the standards would represent.

Wisconsin State Statute 43.24(3) currently allows the Department to reduce aid to systems if they don’t comply with existing standards. Reduction in aid could place additional complications on a system to meet the standards. It is recommended that any system unable to adhere to the standards should be required to develop a 12-month compliance plan approved by the Division to maintain current aid levels. The compliance plan should include resources needed, collaborative and/or consolidation opportunities and a stakeholders communication plan. . .

It is recommended that the library system standards mirror the design of the public library standards for ease of use. The sections should include:

- Statutory Requirements (Chapter 43.15; 43.16; 43.17; 43.19; 43.24; 43.58)
  - Systems
  - Library Membership
PLSR Steering Committee Report Draft Version 3
Version of report draft reviewed at the start of the in-person committee meeting on October 16, 2018

- Tier One, a system must meet all of the Tier 1 standards (base funding?)
- Tier Two, all of Tier 1 and all but two of the Tier 2 standards (performance incentives)

It is also recognized that there are best practices in operating a library system that should not be necessarily addressed through formal standards but would be valuable in standardizing for further study and improvement of library systems in the future. For example:

- **Accounting Standards**

  The system business managers working with the Michael Dennison, the Public Library Data, Funding and Compliance Consultant build upon the work of the Funding Subcommittee to develop standardized revenue and expenditure accounts and terminology to provide consistent and uniform reporting of income and expenditures for the System Annual Reports and System Program Budgets and Plans.

- **Consulting Services**

  It is recommended that a team of system directors/consultants representing the 16 library systems along with Division representation develop a tracking system which uses the broad consulting areas identified in the PLSR Consulting Workgroup report as well as the type (email, phone, in-person, site) and number of interactions per year.

- **Governance**

  The level of individual board member awareness of library statutes and system operations can vary. A “Trustee Essentials” does not exist for system board members instead they rely on the more general version as their guide.

The creation of a formal mechanism to define best practices and standardization of data collection would better allow Wisconsin library systems to review the impact of the PLSR process on state residents as well as continue to improve system services into the future.

**Value Proposition**

Library services in the state are currently delivered to member libraries on an inequitable basis. Member libraries are often unaware of system standards and often systems use their best judgement in delivering services that may or may not be viewed as standard system services in
other parts of the state. In 2013, SRLAAW created a set of voluntary standards to help with this, but service inequity continues. Creating mandatory standards would establish a baseline to ensure every library in the state has consistent expectations of service from their system. This will better enable local libraries to utilize local funding to augment system services in a way that best serves their community.

A substantial amount of time was spent during the PLSR process in gathering disparate data from systems to analyze system services and make recommendations for improvements. Sharing best practices and standard reporting practices between systems will better allow for the measuring the success of PLSR recommendations as well as making further analysis and improvements possible. In addition, especially with financial data, standardization will reduce the time required for mandatory reporting for all systems. Libraries will also be able to compare system services easily, allowing libraries to easily identify and correct inequities of service delivery that may arise in the future.

Suggested Implementation Process

1) DPI Establishes Library System Standards Task Force - December 31, 2018
   a) Model the process and document after the one used for current edition of the public library standards
   b) Composition 6-7 Members: System Directors; Public Library Directors or Library Staff representing Grade 1, Grade 2 and Grade 3 libraries
   c) Task force members should represent a diversity of locations and sizes of systems as service providers and of libraries as service recipients whenever possible. Individuals with experience with different libraries and systems would be a desired characteristic.
   d) Public Library Development Team to act as Task Force Resources and Project Lead
2) Review current accountability measures, what’s working, what isn’t
   a) Currently there are several measures of accountability for library systems-- Governance; System Plan and Program Budget; System Annual Report; and System Plan and Program Budget.
3) Release Draft for Comment - April 1, 2019
4) Final Draft - June 1, 2019
PLSR Steering Committee Report Draft Version 3
Version of report draft reviewed at the start of the in-person committee meeting on October 16, 2018

a) Where should the final draft be submitted? Is this something that ultimately needs to go into statutes?

5) Implementation - July 1, 2019
   a) Sorting process: what could be done under ch 43, what are goals, administrative rules, best practices?

6) Incorporate into System Planning Document - August 1, 2019

7) Formalizing sharing of best practices
   a) System Accounting Standardization
      i) Convene Working Group of System Business Managers - January 2018
      ii) Release draft recommendations - April 1, 2019
      iii) Final Draft and Implementation - June 1, 2019
      iv) Incorporate into System Annual Report, Planning and Program Budget Documents - July 1, 2019
   b) Consulting Services
      i) Convene Working Group of Continuing Education Consultants - January 2018
      ii) Release draft recommendations for tracking - March 1, 2019
      iii) Incorporate any changes from library community - May 1, 2019
      iv) Begin tracking CE/Consulting hours - July 1, 2019
   c) Trustee Essentials
      i) DPI drafts Trustee essentials - January, 2019
      ii) Draft Trustee essentials is presented at WAPL 2019 and shared with the community
      iii) DPI incorporates suggestions received - Summer 2019
      iv) Trustee Essentials formally adopted and distributed - Winter 2019

Suggested Funding Source(s)
1. LSTA - reimbursement to task force and working group members for meetings to discuss and establish standards
2. WISE - any sort of interoperability to share best practices between software systems or reporting forms, talking about data standardization, creating a best practices repository

Measuring Success

1. Standards are drafted and adopted by SRLAAW and COLAND
2. Number of systems who are able to comply with tier 1 standards
3. Number of systems who can comply with higher standard
4. Repository for best practices is created
5. Number of objects in best practices repository
6. Number of uses of objects in best practices repository

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**Governance**

**43.17(1)** BOARD TERMS. Every public library system shall be governed by a board appointed under s. 43.19 or 43.21.

The use of an advisory committee is optional and not required as a mechanism for libraries to provide input.

**43.17(2m) (2m)** ADVISORY COMMITTEE. Every public library system may appoint a public library advisory committee to, among other things, advise the system board about the status and needs of libraries in the system, serve as a conduit of information between the system board and individual libraries in the system and make recommendations to the system board relating to libraries in the system.

**Public Library System Plan and Certification of Intent to Comply (Form PL-2446)**

This is a self-reporting tool that is approved by the system board.

**43.24(3) (3)** Annually, the division shall review the reports and proposed service plans submitted by the public library systems under s. 43.17 (5) for conformity with this chapter and such rules and standards as are applicable. The division may reduce state aid payments when any system or any participant thereof fails to meet the requirements of sub. (2). Beginning September 1, 1991, the division may reduce state aid payments to any system if the system or any participant in the system fails to meet the requirements of s. 43.15 (4).

**System Effectiveness--Public Library Annual Report**

This statement is approved by individual library boards but there is no set accountabilities or measurement techniques to assess system compliance based on required system services.

**43.58(6)(c)** The report to the division shall contain a statement by the library board indicating whether the public library system in which the library participated during the year of the report did or did not provide effective leadership and adequately meet the needs of the library and an explanation of why the library board believes so. The division shall design the form of the
43.05(14)(b) (b) Conduct a review of a public library system if at least 30 percent of the libraries in participating municipalities that include at least 30 percent of the population of all participating municipalities state in the report under s. 43.58 (6) (c) that the public library system did not adequately meet the needs of the library. If the division determines that the public library system did not adequately meet the needs of libraries participating in the system, it shall prepare an advisory plan suggesting how the public library system can so do in the future, including suggestions designed to foster intrasystem communications and local dispute resolution. The advisory plan shall be distributed to the public library system board, the boards of all libraries participating in the system and the county boards of all counties participating in the system.

Wisconsin Public Library System Service Standards (Appendix A) Creating More Effective Public Library Systems Report

These voluntary standards were adopted by the System and Resource Library Administrators Association of Wisconsin on August 2, 2013. Some of the recommendations including documenting collaborative activities on the system plans and annual reports along with the ILS study have been adopted. Some systems began voluntary implementation of the standards within their planning process. As part of the standards development process, it is recommended that all systems assess and document their ability to comply with the standards. The assessment could include a checklist--currently meet ourselves; currently collaborate/contract with others to meet; could implement easily; have done in the last 2 years; or unable to implement with current funding.

- Standard Area Working Groups (Representatives from Systems and Public Libraries)
- System Governance and Administration
  - Service Groups
    - Library Advocacy and Awareness
    - Continuing Education
    - Consulting
      - Inclusive Services
      - Youth Services
      - Adult Services
Chapter 43
Can 43.09 (2) be modified to included 43.24 -- such rules shall be consistent with s. 43.15 and 43.24 (2)....

Administrative Rules
If 43.24 is added to statute can the DPI create standards in PI 6

Best Practices
System Standards

System Plan/Program Budget
DPI adopt new accounting recommendations
Incorporate basic standards (best practices) into plan check boxes

vi. Identify performance measures, is there a foundational document(s) to be used as an example?
   3. PLSR Workgroup Reports

vii. Best practices: how do we track consulting services, accounting standards, accounting for services

viii. Sync to system planning cycle

ix. Task force should be formed ASAP – progress report out to systems August 2019ish
Recommendation 7 - Incentives for Change

Recommendation

The Steering Team recommends the Department of Public Instruction support an incentive program to encourage efficiencies in service to local libraries such as voluntary mergers among the 16 Wisconsin Public Library Systems and participation in regional or statewide services for the purpose of achieving equity in service delivery to all Wisconsin public libraries and reductions in administrative costs.

Summary (Key points to include in narrative)

1. Earlier studies have documented duplication of services and administrative costs for system services.
2. The current consensus is that there are benefits to having fewer systems, regional, and some statewide services, which would reduce administrative costs, improve equity of service, efficiency of operation, and provide greater “protection” against financial downswings.
3. With statewide, regional services and fewer systems, cost savings could be used for to achieve equity or for expanding direct services to local libraries.
4. There is consensus that mergers must be voluntary rather than mandated and that incentives will help motivate systems to undertake the process.
5. Attempts at merging systems or consolidating services can be fraught due to issues of local control, trust, and unclear processes and costs.
6. There is no clear guide to implementing these types of changes and to date. The DPI has an opportunity to provide a level of consulting and support needed by library administrators and boards.
7. A higher level of consulting is needed, including a step-by-step guide, legal assistance, support, and general guidance.
8. The experience of individuals involved in both successful and unsuccessful mergers and consolidated services will be asked to assist in the development of a step-by-step guide.

Value Proposition

1. The use of incentives can help fuel the motivation needed to undertake the challenge of merging systems or moving to regional/statewide service delivery.
2. Financial incentives and professional support provided through DPI will help with the direct costs as well as the personal costs.
3. A successful voluntary merger and/or regionalized service can be a catalyst for encouraging others to consider merging.
4. While every merger or move to consolidate will be different, certain elements must be present to ensure success, including trust and commitment.

5. Incentives to consider include funding for both future and the change process, such as attorney’s fees; an action plan that can be followed, authoritative support from DPI, funding for project leadership and support staff.

6. These changes, when supported financially and through expert professional assistance, can be empowering to those directly involved, and inspiring to others.

Suggested implementation process

1. Department of Public Instruction to identify resources to support mergers and/or regionalization of services.

2. Grants will be awarded to participating systems to cover costs related to project management, consulting, legal fees, planning, facilitation, legislative support, fiscal analysis, and other related expenses.

3. DPI will create a step-by-step guide in collaboration with subject experts who have experience with merging or consolidating services, to assist systems who wish to voluntarily undertake such changes.

4. DPI to play a leadership role in advising and guiding systems.

5. Develop standards and best practices regarding accounting and bookkeeping practices to smooth future consolidation of services and/or systems.

Recommendation measuring success.

1. Merger guide to assist with articulation of expected measurable outcomes

2. Success to be measured against these outcomes at specified benchmarks

3. At least one successful merger and one successful regionalization of services.

4. Evaluation tools may include process surveys, satisfaction surveys, data analytics, interviews, etc.

5. Recommend publishing results in local and national publications and presenting at relevant conferences.
Appendix - Funding Strategies and Sources

The PLSR project has not only produced the recommendations in this report, but a series of deep dives (in the form of work group reports) into each individual service provided regional library systems. Taken as a whole, it is abundantly clear there are a variety of opportunities to improve access to services, and to improve the effectiveness of the services themselves. In order to move forward without significant disruption to libraries and patrons, new service infrastructure must be put in place in parallel with the old. Realistically, this will require additional sources of funding beyond what is currently available in the form of state aid to regional systems.

Through the process of recommendation development, a number of common themes have emerged in regard to potential sources of additional funding to support implementation:

- **In-Kind resources contributed by state agencies.** The Department of Public Instruction, Department of Administration and others have significant staff assets, though it is understood that resources are finite and priorities are many. These agencies could incorporate implementation of PLSR recommendations into their planning processes, so as to allow. Examples of in-kind resources might include:
  - User experience (UX) or design consulting expertise in regard to a library staff continuing education portal and validation tracker;
  - Direct development of software or web applications related to a library staff continuing education portal and validation tracker or ILS discovery layer;
  - Web hosting for a library staff continuing education portal and validation tracker;
  - Administrative coordination of ongoing initiatives related to moving the PLSR recommendations forward.

- **Library Services and Technology Act funding derived from the “Grants to States” program.** Through this program, Wisconsin is allocated roughly 2.8 million dollars. Expenditures of these dollars are prioritized by the Department of Public Instruction. Future planning by the division could incorporate funding to support implementation of PLSR recommendations. Specific examples may include:
  - A grant category to support a regional delivery pilot build-out;
  - A grant category to support development of a state-scale discovery layer;
  - A grant category to incentivize development and implementation of system best-practices.

- **Library Services and Technology Act funding derived from other specific grant programs.** A number of non-block grant programs exist, including the “Laura Bush 21st Century
“Librarian” and “National Leadership Grant for Libraries” programs. Other programs may be established in the future. These programs may provide an opportunity to acquire funding for components of the recommendations that require more in-depth work. Examples may include:

- Grant applications designed to fund additional project management capacity.

- **Funding related to the Wisconsin Information System for Education (WISE) program.** The WISE program is focused on creating - and coordinating - the services and infrastructure required to improve how we use data to learn and educate. This program has recently been broadened to include libraries. It is possible that WISE-related funding (or other assets) may be allocated to implementing certain recommendations. Examples may include:
  
  - Funding the development of a uniform set of ILS communication messages;
  - Using the list of ILS communication messages to build a universal ILS communicator tool to aid regional delivery pilots;
  - Working with ILS vendors who do business in Wisconsin to ensure compliance with uniform communication specifications;
  - Funding and coordinating a process of product evaluation.

- **Increase in state aids to the regional library systems.** Annual state aid funding is allocated according to state statutes and the administrative code. However, the library community could establish future legislative priorities which include requesting a modest increase in state aid which the existing systems would use to collectively fund specific implementation components of PLSR recommendations. Examples may include:
  
  - Funding for the development of a universal ILS communicator tool to aid in regional delivery pilots;
  - Funding designed to ease transition to any changes to a modified funding allocation formula;
  - Any components of the recommendations or opportunities identified through the PLSR process with strong collaborative potential.

This document should be read as an initial consideration of potential funding sources. It is possible other sources may exist.