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Wisconsin Public Library Consortium
Technology Collaboration
Data Dashboard Workgroup – Meeting Notes
November 6, 2023, 1:00 pm -2:30 pm
via zoom*

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ATTENDEES: Melissa Aro (DPI), Erica Brewster (WVLS), Tim Drexler (SCLS), Anneliese Fink (MLS), Dominic Frandrup (Door County), Steve Heser (MCFLS), Joshua Klingbeil (WVLS), Lori Roholt (IFLS), Bruce Smith (DPI)

Jennifer Chamberlain (WiLS) and Melody Clark (WiLS) – Project Managers

ABSENT: Kim Kiesewetter (WiLS), Rob Nunez (KPL), Shannon Schultz (DPI)

Meeting started at 1:00 pm.

1. **Research Check-in: any process questions or other concerns? (10 min)**
   J. Chamberlain asked if there were any questions from the workgroup on the process we're following or any other thoughts folks would like to share before we get started talking about the various dashboards everyone reviewed. No questions were shared at this time.

2. **Discussion on Data Dashboard reviews (60 min)**
   J. Chamberlain thanked everyone who took the time to review the dashboards and for sharing notes in the spreadsheets. A lot of work has been done over the past several weeks.

   The Out of State/External Dashboard team was invited to share where they are in their process first. Thanks were given to Melissa Aro for getting that group organized around several dashboard examples. Melissa gave a brief overview of the state resources she encouraged folks to explore.

   Comments from External Dashboard task team:

   - M. Aro shared that the outside group each reviewed, and then she combined all evaluations in a master tab. It was noted that Lib Insides/libguides should also be reviewed. There is a tab of links to libraries using libguides. It was noted to not share any passwords to these databases.
   - The evaluation noted that all of the information they looked at doesn't really meet the needs of WI libraries. They really are ways to show annual data. However, it was shared that they shouldn't be discounted, as they could be built upon.
   - S. Heser noted that the libguides links are pretty good but are focused more on the sharing of information from a libguides platform.
   - L. Roholt noted that she didn't see value added over the tools that are already in place in WI.
   - Finke noted that she felt Montana's was the best. It was shared that it is very customizable. Montana uses Tableau.

- E. Brewster asked if it would be worth looking at other platforms outside of library data (like school data, etc.)
- It was noted that it is hard to review since these are all showing just annual data.

J. Chamberlain asked if the group wants to do more research on the libguide. It was suggested that the group should review Wisconsin's dashboards first.

Comments from Wisconsin Dashboard task team:

- D. Frandrup noted that some of the dashboards reviewed weren't customizable by county and various municipalities, which would be ideal.
- E. Brewster noted that she met with Kim Kiesewetter and she noted that a county cluster could be added as an option, and there might be other customizable features.
- It was noted that with Tableau, it would be nice to be able to break some data down by times of the year, circulation by hour by hour, or during the summer, etc.
- T. Drexler noted that for SCLS, most of the data is loaded monthly, so it is segmented that way. More up-to-date would be possible, but he noted that he has not received requests for that from the SCLS libraries.
- S. Heser noted that if you are using these dashboards for an annual report, it is beneficial. MCFLS uses the IFLS dashboard, and they upload data nightly. And it seems like there are two different needs here: the need for more granular information and then the big picture, annual information. Is there a product that serves both of those purposes?
- J. Klingbeil noted that when approaching the dashboard from their perspective, they run scripts hourly to update their dashboard. They then have the static views that are on top of the data. There is not much customization that is available for libraries. They can do some grouping, but it is all hard-coded. They don't have a mechanism to take the raw data and put it into annual report format to upload into DPI's annual report automatically. It was noted that not knowing what the data looks like and whether or not the data has the information needed to be able to break the data out into the needed categories makes looking for/at dashboards somewhat circular.
- E. Brewster noted that a part of this is knowing what data is needed and is useful. She shared that she is currently a part of the WiLS Data Classroom and is currently looking for a research question. She is thinking that she will look at what data is going to be useful for library directors and could use that research for this group.
- S. Heser agreed that the group needs to identify what data we are after and we can build a platform around that.
- M. Aro noted that Bridges new database uses Power BI and DPI also uses Power BI for internal data. With more frequent loading of data, it takes far more time and resources than less frequent, like monthly. DPI doesn't have a list of all the data needs for all libraries within the state. They focus more on the commonalities. They need to have a means for people to have a tool to understand what can be done with a dashboard so then they can use it and then identify what they really want from the data. The primary item the group is talking about is static data and how much flexibility is available for folks to modify and manipulate the data.
- B. Smith noted that the Data Landscape study doesn't have an exhaustive list of data types but does contain listings of commonly used data. The timeliness of data was

identified as important. However, not more than monthly was frequently needed. It was also noted what the data pieces are and how they are ingested. B. Smith asked if there is a need to have an intermediary to do some queries or can the information be obtained by the end user.

- T. Drexler echoed what B. Smith noted that a dashboard can be built on what they think they know is wanted, but until it is out there, the questions aren't necessarily identified.
- L. Roholt noted that she believes there is an opportunity for statewide collaboration on both elements. The reporting layer and data aggregation layer are the two parts that should be approached to produce a meaningful outcome.
- Focusing on the two different layers makes it more feasible to integrate multiple ILSs.
- S. Heser noted that what the group is looking for is something that is very scalable.
- Annual report data is a good place to start, but the actual data used should be more recent, possibly monthly.
- DPI could survey the systems to see if they have capacity to provide data on a monthly basis.
- E. Brewster noted a best case scenario dashboard would:
  - Core and expandable dataset
  - Updated regularly (monthly)
  - Of interest to user
  - Intuitive to user
  - Query-able by user

3. **Discussion on next steps (20 min)**

It was asked how the group would like to move forward.

D. Frandrup asked which products have expandable datasets. And it was noted that it may be helpful to know what are the logistics involved in adding datasets. (What is it built around, can it expand, and can it incorporate data based in other languages.)

M. Aro noted that she believes all of the tools currently being used in Wisconsin can have data added. And asked what is needed to stand something up? – What does it take to pull this together to look at something that is more than just a few systems?

T. Drexler noted that most of these do the same thing regarding ingesting data. They all have a learning curve, but all have similarities that are transferable. The more significant challenge may be folks having the time to get over that learning curve.

The group agreed that the next step is to pick one dashboard to move forward with testing. However, there are four possible choices: Power BI, Looker Studio, Tableau, and Libguides. To help make a determination, demos for the four options will be set.

The next meeting will be held December 5, 2023 at 12:00 pm.
Meeting ended at 2:33 pm.