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Wisconsin Public Library Consortium
Technology Collaboration
Data Dashboard Workgroup – Meeting Notes
January 12, 2024 | 11:00 am -12:30 pm
via zoom

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ATTENDEES: Melissa Aro (DPI), Jennifer Bernetzke (SWLS), Erica Brewster (WVLS), Tim Drexler (SCLS), Dominic Frandrup (Door County), Kim Kiesewetter (WiLS), Joshua Klingbeil (WVLS), Lori Roholt (IFLS), Bruce Smith (DPI)

ABSENT: Anneliese Fink (MLS), Steve Heser (MCFLS), Rob Nunez (KPL)

PROJECT MANAGERS: Jennifer Chamberlain (WiLS) and Melody Clark (WiLS)

The meeting started at 11:03 am.

1. **Pilot Decision and Process Outline review**
   The group was welcomed and thanked for providing feedback in between meetings with the survey that was sent out. After the last meeting, it was felt it was needed to get a firm understanding of the will of the group: was this work moving toward pilot and if so, which platform did the majority of folks feel would be best, or did the group want to move toward a recommendation of needing more information or research on how we could better support libraries in their needs for analyzing and visualizing data. From the survey, seven responded to the survey, and the responses were unanimous to move ahead with a dashboard pilot. Looker Studio was the preferred platform, and so the process outline assembled is laying out the steps needed to get this product ready for statewide rollout.

   Project managers shared the pilot decision and the [process outline](#). It was noted that there was unanimous support for moving ahead with piloting a dashboard. Since Looker Studio was selected, in talking with Melissa and Bruce from DPI, it was realized that beta testing is unnecessary as this dashboard is already in production – Additional information on what people would like in a dashboard should come from the pilot.

   J. Chamberlain asked for any general questions about the process outline and timeline.
   It was noted that for the next meeting, February 5th and 6th will most likely not be feasible due to library legislation day. The group agreed to review the report asynchronously in lieu of a meeting.

   From now to June, K. Kiesewetter will need to prepare the dashboard for statewide use. This work will include:
   - Getting the dashboard ready:
     - Creating a copy of the existing dashboard that creates cohorts by locale code
     - Adding a dashboard element based on population size
     - Develop materials explaining cohorts and how to find relevant cohorts
   - Create training materials to include a tutorial, written instructions, testing script

- Creating a feedback mechanism to be screened by Melissa at DPI and Kim will answer individual questions as needed.

It was asked if logins would need to be set up. K. Kiesewetter shared that she plans to have it fully open with no logins during the pilot. D. Frandrup shared appreciation for removing any login barriers.

J. Klingbeil also shared appreciation for the openness of the dashboard during the pilot. In the future it will be meaningful to talk about accessibility of being able to administer and manage the platform.

It was asked where will all the materials for the dashboard live. Most likely, they will be accessible on the WPLC website. K. Kiesewetter asked if the colors of the dashboard should be changed as they are currently WiLS colors. It was suggested that WPLC branding and colors be used.

It was shared that an option, in the long run, to have systems be able to brand the dashboard for their purposes easily would be helpful.

A list of future recommendations could be added to the recommendation report. K. Kiesewetter, M. Aro, and T. Drexler can work on this as well, and the group can get feedback on future recommendations from the pilot.

M. Aro suggested that the pilot period should be shorter than the suggested six months. L. Roholt suggested a plan be put in place for rollout to ensure a mix of libraries are participating. Working with the system and adding messaging to the systems to make sure information is shared with all libraries. K. Kiesewetter offered to attend a System Directors meeting to introduce and talk through the pilot. The group may want to consider having the system staff review and look at the dashboard first. It was suggested that the pilot avoid the summer reading program time frame. In addition, if the pilot is delayed, there is a possibility to include the 2023 data.

DPI shared that they plan to continue the Collaborative Data Project Support category in its upcoming LSTA 2024 budget (performance period June 30, 2024-July 1, 2025). The final amount that will be allocated for this category is still to be determined, but the current estimate is $5,000. The guideline description and definitions for this category 2024 will specify that funds can be used to support expenses related to the WPLC data dashboard pilot. Allowable expenses will include project management fees, dashboard preparation costs for the pilot launch, and dashboard access fees for all public library staff in Wisconsin during the pilot. The DPI Library Service Team Director, Ben Miller, will attend the February 13, 2024, WPLC Technology Steering Committee and February 19, 2024, WPLC Board meetings and looks forward to DPI, Systems, and Libraries working together to move forward on this pilot, including identify funding support.

DPI also noted that they are thinking about what happens after the pilot ends and how they can work with systems to support the future.

It was suggested that one of the pilot questions should be around whether people would want to maintain access to a resource like this dashboard and a related question on how they suggest funding it.

A pilot period of September through December was suggested. A six-week period was suggested, but folks felt that was too short. A three-month period was suggested to engage different groups of people but also create and keep some urgency to participation.

It was suggested that the group should include some time estimates for folks on how long certain tasks might take in the testing script and/or instructions.

The next steps then are to prepare the findings and recommendation report so it's ready to share with the WPLC Technology Steering Committee at their February 13th meeting.

2. **Drafting the Recommendation Report**

The workgroup discussed and identified the remaining resources needed to conduct a 2024 dashboard pilot for the findings and recommendation report for the Technology Steering Committee.

Project managers are drafting up a findings and recommendation report. Preliminary TOC for the report is:
- Project background & development
- Workgroup structure
- Exploration process overview – how the workgroup did the work
- Scoring rubric and selection
- Recommendation for pilot and next steps
    - Timeline
    - Communication plan
    - Resources needed to conduct pilot

T. Drexler suggested incorporating information on the feedback mechanism. It was also suggested that an intended or desired outcomes section be added. Project managers will finalize the draft and share it with the workgroup as soon as possible.

It was shared that a cost estimate from WiLS for dashboard prep, resource material development, tech support/troubleshooting, etc., is in the works.

J. Chamberlain noted that they are looking for volunteers to help with a few things. A. Finke already volunteered to assist in developing a testing script and evaluation form. It was asked if anyone else is interested in helping with this or in providing feedback on an as-needed basis to send an email to J. Chamberlain directly.

3. **Review next steps and any remaining questions from the workgroup**
It was asked if it was easy to embed Looker Studio and if systems could do that in their local system websites. K. Kiesewetter noted that she can send out the embed code to the materials that will be sent out to systems.

4. **Determine the February meeting date**
   The group decided to review the draft asynchronously without setting a February meeting date.

Meeting ended at 12:15 pm