# Road Map to a Statewide Library Data Dashboard Solution
### Draft June 29, 2023

## Initial WPLC Governance Actions (July-August 2023)

**July 11, 2023**
WPLC Technology Operations Committee Meeting – Formalize Proposal to Steering Committee

**August 2, 2023**
WPLC Technology Steering Committee Meeting – Review Proposal
- Approve creation of a Statewide Data Dashboard Development Workgroup
    - Workgroup Composition (10-12 total members)
        - WPLC Technology Steering Committee (1 member)
        - Technological Expertise (5-7 members)
            - Data Warehouse knowledge
            - ILS Platform knowledge
            - Scripting knowledge
            - WPLC Operations Committee (based on interest and expertise)
                - IFLS – Lori Roholt (ILS Coordinator)
        - Data Users from Library & System Staff (5-7 members)
            - Interested members of the DPI Data Services Workgroup
    - Subject Matter Experts to Workgroup
        - IFLS/LEAN Dashboard Model – Josh Klingbeil (WVLS CIO) and Steve Heser (MCFLS Director)
        - SCLS/Tableau – Tim Drexler (Data Analyst)
        - WiLS/Google Looker Studio – Kim Kiesewetter (Data Analyst)
        - DPI – Melissa Aro (Data Analyst – Data Warehouse/School Dashboards)
        - DPI— Shannon Schultz (Consultant – Library Standards)
        - DPI – Bruce Smith (Project Management Liaison)
    - User Beta Testers to Workgroup (up to 15 max. – ensure all systems have at least 1 person participating in at least 1 of the groups: workgroup, SME or tester)
        - Interested members of the DPI Data Services Workgroup
- Solicit Proposal from WiLS for workgroup project management – currently $5,000 in 2023 LSTA funds (July 1, 2023-June 30, 2024) is available for Collaborative Data Project development needs with WVLS as the LSTA fiscal agent of the grant sub-award
- Confirm major touchpoints

**August 7, 2023**
WPLC Board Meeting - Update on the formation of the workgroup and project management/LSTA plans

## Explore Solution Potential of Existing Wisconsin Library Data Dashboards (September 2023 – February 2024)

**By no later than September 15**

WPLC Technology Steering Committee finalizes project manager activities and costs and, with assistance from Project Manager, populates the workgroup and holds first workgroup meeting to do the following:

- Select Project Lead/Chair
- Review Operations Committee Proposal
- Establish virtual meeting frequency
- Determine what, if any, additional support might be needed based on initial scope
- Determine and assign group tasks

**September 15, 2023 to January 15, 2024**

Scope of workgroup's activity

- Evaluate existing library data dashboards in Wisconsin
  - Determine/develop criteria to evaluate existing Wisconsin library data dashboards based on Operations Committee proposal specifications:
    - Sustainability
    - Expertise/knowledge needed by systems and/or end user
    - Adaptability to add new features
    - Integration of existing data sources
    - Resources needed - fiscal and personnel
  - Find and review other library examples in other states or non-library examples to use as comparisons to help determine suitability and development potential of the existing library data dashboards in Wisconsin
  - Using the established criteria determine suitability of any existing dashboards for a statewide data dashboard(s) pilot project
- Create Findings and Recommendations Report
  - Potential recommendation paths
    - Implement a statewide pilot project of existing WI library data dashboard(s), with recommended modifications or set up needs and requirements, to gather feedback and identify development capabilities **or**
    - Engage in further research and development of an alternative data dashboard platform solution, including potential use of an expert consultant
  - Timeline of major next steps activities
  - Estimated costs of next step activities based on recommendations
- Provide written updates to WPLC Technology Steering Committee, as needed

**October 16, 2023**

WPLC Technology Steering Committee shares draft process framework for project development and implementation within WPLC structure at WPLC Board Visioning Summit using the Data Dashboard Development Project as a model for discussion

- Key takeaways/areas for refinement for the Data Dashboard Development project process and other future potential collaborative technology development projects

**November 7, 2023**

WPLC Joint Technology Steering & Operations Committee Meeting

- Project update by workgroup
- Consider potential development process refinements based on Visioning Summit input

**By January 15, 2023**

- Workgroup completes evaluation process
- Delivers Findings and Recommendations Report to the WPLC Technology Steering Committee

**February TBD, 2024**

WPLC Technology Steering Committee Meeting

- WPLC Technology Steering Committee reviews workgroup Findings and Recommendations Report and develops next steps proposal for the WPLC Board
    - o Fiscal needs – including LSTA support input from DPI (Ben Miller)
    - o Ongoing personnel needs
    - o Potential one-time consultant needs
    - o Governance and Workgroup structure for future phases
    - o Timeline
    - o Share next steps proposal with WPLC Board

**February TBD, 2024**

WPLC Board Meeting

- Discuss Technology Steering Committee's next steps proposal based on workgroup findings and recommendations
- Make decisions, as or if needed, based on proposal recommendations

**Next Steps and Timelines Based on Potential Recommendation Paths**
- March-June 2024 - up to $45,000 additional 2023 LSTA funds could be available, dependent on available LSTA funds
  - Take steps necessary to prepare to launch a statewide pilot of existing WI Library Data Dashboard(s) **or**
  - Develop a new plan and timeline to research an alternative platform solution, including potentially developing a bid request to hire an outside expert to help
- July-December 2024 – 2024 LSTA funding could support
  - Implement pilot of an existing WI Library Data Dashboard(s) to gather input from libraries and systems across the state to identify development opportunities and potential **or**
  - An alternative platform solution is identified with a development and implementation plan
- January-March 2025 - 2025-2027 LSTA funding could support further development needs with a planned phase out and ongoing system participation/investment through WPLC established at June 2024 board meeting
  - The existing WI Library Data Dashboard(s) pilot is evaluated and next steps, costs, and funding are determined and decided upon to collaboratively commit to longer-term dashboard implementation and development **or**
  - An alternative platform solution and implementation plan is evaluated and next steps and costs are identified **or**
  - There is no recommended WPLC collaborative action. Should there be agreement at any time during the project that the development of a statewide library data dashboard won't be supported by WPLC, DPI would recommend:
    - That systems work with DPI to establish data standards related to the collection of data and use of metrics to ensure, minimally, we are collectively speaking the same "data language" across the state
    - DPI works with systems to explore other options to find a solution so there is equitable access to a baseline data dashboard tool for libraries to better access and use commonly available library data sets

# Draft suggestions for detailed workgroup action steps and timeline

**1st Workgroup Meeting by September 15** - Create Task Teams

1. Criteria development and evaluation planning team
    a. Workgroup: 2-3 experts and 2-3 users
    b. SME: Josh, Kim, & Tim
2. Out of state/non-library dashboard research team
    a. Workgroup: 2-3 experts and 2-3 users
    b. SME: Melissa & Steve

**Task Team activities – by the end of October**

1. Criteria development and evaluation planning team
    a. Develop evaluation criteria and a rubric survey for tester feedback
    b. Create guidelines and schedule for dashboard capability and use demonstrations
2. Out of state/non-library dashboard research team
    a. Ideally, identify 3-6 dashboard examples that research indicates may best meet criteria to use as comparisons to consider suitability and potential of existing WI library data dashboards

**Workgroup activities – November/December**

1. Hold dashboard demonstrations with workgroup members, SMEs, and beta tester group
2. Reserve time for sandbox set-up, including setting time periods for workgroup members, SMEs, and beta testers to play with and test existing WI library data dashboards and other dashboards if feasible
3. Evaluate options and develop recommendations

**Workgroup activities – January**

1. Finalize recommendations and deliver report to Technology Steering Committee