

## September 2018 Consultant Team Report

### Jean Anderson

- Vacation Sept. 4-14.

### Shawn Brommer

- **Highlights:**

- **Sun Prairie Public Library Vision, Core Values, and Supporting Actions project:**

- With Jean Anderson, co-facilitated in-service for the staff of the Sun Prairie Public Library to identify Core Values of service and the actions and behaviors that support these Core values (8/10/18).
- Jean and I condensed & summarized the information provided by Sun Prairie staff at the in-service and created a one-page document that connects the Core Values to the Sun Prairie Public Library's Vision and Mission.
- Deb Haeffner created a visually-appealing Core Values guidelines sheet that will be given to all Sun Prairie Public Library staff members, board members, community stakeholders, and others.
- I met with Sun Prairie Public Library staff members on Sept. 10th & Sept. 11th to "unveil" the final document and to celebrate the work that the Sun Prairie staff put into this project. This was a wonderful and rewarding project and I appreciate the trust of Svetha Hetzler and staff of the Sun Prairie Public Library.

- **Inclusive Services Institute retreat (Aug. 12 - 14):**

- Served as a co-leader for the statewide Inclusive Services Institute, which was held at the Concourse Hotel in Madison.
- Shauna Koszegi, from the Sun Prairie Public Library, and Mark Jochem, SCLS Workforce Development Specialist, are participants in the Institute cohort and play crucial roles in creating resources for Wisconsin Public Library staff & administration to use when evaluating their programs, services, materials, and buildings for inclusivity. The documents will be finished by the end of 2018.

- **Strategic Planning:**

- SCLS

- Facilitated a tailored Strengths, Opportunities, Aspirations, and Results (SOAR) discussion with the SCLS Board of Directors on 8/23/18.
- Developed draft 2-page strategic plan
- With Martha Van Pelt and Dr. Anjali Bhasin (SCLS Board member), beginning to draft the Executive Summary and Environmental Scan supporting documents.

- **Youth Services**

- Summer library programs wrapped up at most libraries in mid-August. This has been another stellar year with many libraries reporting increased participation numbers over 2017!

- Preparing for Fall 2018 Youth Services events:
  - Annual Fall SCLS Youth Services Meeting, SCLS Headquarters, 10/5/18
  - Annual Youth Programming workshop, Olbrich Gardens, 11/2/18
  - CCBC Shorts webinars: A monthly look at books for children & teens webinar series
    - September 12, 2018
    - October 17, 2018
    - November 14, 2018
    - December 12, 2018

### Deb Haeffner

- Working with Belleville on the Design Development Plans for new library.
- Working with Pinney Library to help them move to their temporary location at the end of the year. Working on floor plans, shelving, staff, locations.
- Working with Marshfield to select some new children's furniture for their library.
- Working with Rock Springs to select and design a new library location.
- Continuing to finesse Three Lakes furniture order.
- Working on fall program brochures, flyers, newsletters & calendars for member libraries.
- Attended several webinars on how to work with customers to get the most out of their space and designs, Pantone's color trending for 2019, and lighting use in your spaces.
- Met with a carpet rep to see new products.
- Working on several graphic presentation pieces for various library & meetings.

### Jody Hoesly

- **Dashboards**

- **SOUTH CENTRAL LIBRARY SYSTEM DASHBOARDS:**

- <https://public.tableau.com/profile/scls#!/>

- **MADISON PUBLIC LIBRARY DASHBOARDS:**

- <https://public.tableau.com/profile/madison.public.library#!/>

- **Budgets:** Updated Columbia County dashboards they plan to use in budget discussions:

- [https://public.tableau.com/views/ColumbiaCountyLibraries/Stats?:embed=y&:display\\_count=yes](https://public.tableau.com/views/ColumbiaCountyLibraries/Stats?:embed=y&:display_count=yes). There is a tab with stats and a tab showing income over time.

- **LinkCAT PSTATs:** Cardholders are assigned a PSTAT (Patron Statistical Class) based on their home address. These codes are also used in calculating reimbursements. As part of the strategic planning process, Oregon, Black Earth, & Monona requested visuals around where people live, using PSTATs. To explore PSTATs, the following is being done:

- Geocoded LinkCAT PSTATs that align with a geographic location (city, town, village, census tract, alder districts, school district or tribal land)
  - Overlaid and merged geographic maps corresponding to PSTAT geographic locations.
  - Looked up 2010 populations and added data to geographic locations.
  - Joined multiple sources.
  - Posted preliminary dashboard:  
[https://public.tableau.com/views/2017SCLSLinkCATPatronStatisticalClassesPSTATs/2017SCLSLinkCATPSTATs?:embed=y&:display\\_count=yes&publish=yes](https://public.tableau.com/views/2017SCLSLinkCATPatronStatisticalClassesPSTATs/2017SCLSLinkCATPSTATs?:embed=y&:display_count=yes&publish=yes)
- Questions being explored for additional dashboards include:
  - ***Where do our residents go to borrow materials?***
  - ***Where are people coming from who are borrowing materials from our library?***
  - ***What percent of our library checkouts are for our local residents?***
  - ***How do our residents use the library in comparison to other libraries (per capita)?***
- **Annexation Impact on Patron PSTATs:** There are plans for the Town of Madison to become part of Madison and Fitchburg by 2022. Fitchburg library is investigating how this will impact codes assigned to where people live (pstats) and reimbursement. To explore ways to identify library patrons who need to change their residency from Town of Madison to Fitchburg, the following was done:
  - Created a Tableau map that shows the current borders:  
[https://public.tableau.com/views/Fitchburg-2022/T-MadC-Fit?:embed=y&:display\\_count=yes](https://public.tableau.com/views/Fitchburg-2022/T-MadC-Fit?:embed=y&:display_count=yes).
  - Geocoded Town of Madison addresses and plotted them on the map to see if a subset could be extracted of patrons who will become residents of Fitchburg. This will not be posted to Tableau Public. Unfortunately, the US Census geocoder only provided results for about 75% of the residents.
  - Shared results and recommended asking the City of Madison if they could do something similar using more sophisticated mapping tools such as ArcGIS.
- **Tableau Prep**
  - **Overdrive Statistics:** Continuing to work with Overdrive data (January 1, 2015 to July 1, 2018) that includes patron barcodes. Successfully joined the Overdrive data with patron records from our Integrated Library System (ILS). Added circulation data, but still working through some join issues. Presented to WPLC committee our plans for using the data.
- **Scripting and Reports Team**—The Scripting and Reports team meets bi-monthly to review projects targeted at supporting SCLS scripts. Working on:

- **Electronic Resource Usage:** Working on design criteria and data prep workflows for electronic resource usage that aligns with annual report requirements. The goal is to provide better statistics in a visual format that can be easily update.
- **WI Trustee Training**
  - **Presented the last Trustee Training webinar called *Crafting your Library's Story with Data*:** <http://www.wistrusteetraining.com/>. Responded to follow-up questions.
- **Other**
  - **DPI-Michael Dennison:** Met with Michael Dennison, the new Public Library Consultant – Library Data, Funding, and Compliance at the Department of Public Instruction (DPI) to discuss annual reports and dashboards using Wisconsin and the Institute for Museum and Library Services (ILMS) data. The discussion focused on current projects, access to raw data, and ways we can collaborate.
  - **DPI -Shelly Witte:** Met with Shelly Witte, GIS Technician for DPI who provided helpful tips to merge maps using the software package QGIS.
  - **Fundraising Thermometer:** There have been over 2000 views of the New Glarus fundraising thermometer:  
<https://public.tableau.com/profile/scls#!/vizhome/TownofNewGlarusMatchingGrant/Thermometer>.
  - **McFarland Visit:** Met with Heidi Cox to help her get started with Tableau creating her own thermometer. We also brainstormed questions and measures for current and future Tableau projects.
  - **Non Link Meeting:** Met with Jenna Assmus to discuss data that could support discussions about moving to LinkCAT for Non Link libraries. We scheduled a follow-up meeting in October to review these in more detail.
  - **Green County Mixer:** Attended the Green County mixer to meet other trustees and library staff.

## Mark Ibach

- Met with Rep. Mark Pocan at Reedsburg Public Library and presented Libraries Transform poster.
- Conducted New Director Orientation in Portage.
- Attended Joint Randolph Village Board/Library Board meeting.
- Attended Dane County Directors meeting in Verona.
- Worked with Craig Ellefson, Tamara Ramski and Vicki Teal Lovely to prepare equipment requirements and loaning requirements for statewide LSTA Digitization grant project.
- Attended Prairie du Sac Library Board meeting to review applications for new director.
- Attended Monticello Board Meeting
- Participated in phone meeting with Contegix/Black Mesh about website hosting migration.

- Attended Columbia County Directors meeting in Poynette.
- Met with Dr. Terrance Newell, new manager at Meadowridge Library (Madison Public Library), to talk explain SCLS services and resources.
- Conducted New Director Orientation in Pardeeville.
- Attended Green County Library Board.
- Worked with Martha Van Pelt to answer legal and procedural questions for SCLS member library directors.
- Produced Top 5 (weekly) and Online Update (every-other week)

### **Mark Jochem**

- Attended Southwest Wisconsin Workforce Development Board Meeting
- Reported on activities to Library Innovation Subcommittee
- Completed Major Employers Career Page Links for Portage County
- Developing 'Major Employers' career page links, with a description of information needed to apply for jobs.
- Working on resources available to patrons in Monroe
- Conducted library visit at Cambria
- Attended Green County Library Board meeting with Mark Ibach.
- Met with the services coordinators, "One Stop Operator," at Dane County Job Center to discuss activities in Dane, Sauk, and Columbia counties
- Planning to collaborate with Workforce Development Boards on Job Center services webinar available in SCLS counties
- Connected WorkSmart Network (a designated service provider of the Workforce Development Board of South Central Wisconsin) to Winnefox, Monarch, and Bridges library systems.
- Began curating webinars to help train library staff and assist patrons
- Attended via phone the North Central Wisconsin Workforce Development Board meeting

### **Tamara Ramski**

- The Stoughton Public Library, Sauk City Public Library, and Marshall Community Library have digital collections being harvested for the first time to Recollection Wisconsin. The Albertson Memorial Library (Albany) and the Kilbourn Public Library (Wisconsin Dells) have new materials added to their collections. Approximately 2500 new items are being uploaded with this harvest.
- Started a Local History Digitization Project User Group email list to share information about local history digitization projects and to offer resources and training on related topics. <http://warden.wiscnet.net/mailman/listinfo/scls-digitization>
- Met with Emily Pfothauer, Recollection Wisconsin administrator about Recollection Wisconsin collections and digitization projects.
- Participated in an online meeting with the Wisconsin Public Library Consortium (WPLC) Historical and Local Collections Committee group.

- Worked with Mark Ibach, Vicki Teal Lovely, and Craig Ellefson to prepare equipment requirements and loaning requirements for statewide LSTA Digitization grant project.
- Materials for the Stoughton Public Library and the Kilbourn Public Library (Wisconsin Dells) were scanned on the Indus BookScanner.
- Library Visits:
  - Angie W. Cox Memorial Library (Pardeeville)-Met to discuss the digitization project. Will be delivering a Scanning Kit/providing training on it on September 12.
  - Jane Morgan Memorial Library (Cambria)-(Visit #1) Met to discuss the digitization project. Created project plans. (Visit #2) Delivered a Scanning Kit/provided training on it.
  - Columbus Public Library-Meet to discuss their community scanning event (to begin on September 26).

## Rose Ziech

- **Sept. 10-14**
  - Email & phone contacts: provided info about website editing (LaValle), added domain name record for DiscoverLocal mobile app (DeForest).
  - Drupal theming & tweaking: prepared migration assessment and participated in kickoff phone call for hosting migration project, slideshow and website changes for Demco Signup integration into website (Waunakee).
  - LINKcat: continued Discovery Layer configuration and theming.
  - SCLS website: provided overview and access to Google Analytics data for Workforce Development Resources pages.
- **Sept. 3-7**
  - Email & phone contacts: sent weekly Top 5 email, adjusted number of slides in homepage slideshow (Reedsburg), provided info about common CE opportunities (Pardeeville), added website editing account (Monticello), opened conversation about SCLS website hosting (Sauk City).
  - Drupal theming & tweaking: tested Feeds module for Demco Signup integration into website (Waunakee).
  - LINKcat: continued Discovery Layer configuration and theming.
  - Committees: suggested agenda items for Discovery Interface Subcommittee meeting.
  - SCLS website: offered steps for removing unneeded content & images.
- **Aug. 27-31**
  - Email & phone contacts: sent blog author invite (Stoughton), shared info about table styline (Mount Horeb), shared options for adding paragraph text to web forms (Belleville), added library value calculator page on website (Wisconsin Dells), troubleshooting block/image styline on homepage (Verona), updated podcast link in TechBits article (Sun Prairie),

troubleshooting display issues for LearningExpress Library website on PAC PCs.

- Drupal theming & tweaking: added developer access and shared info about hosting (Pardeeville), prep and go-live for redesigned website (Dane County Library Service-Beyond the Page).
- LINKcat: continued Discovery Layer configuration and theming.
- **Aug. 20-24**
  - Email & phone contacts: added new website editing account (Reedsburg), stayed in loop on Signup subscription (Waunakee).
  - Drupal theming & tweaking: continued beta website content staging, styling and configuration and go-live planning (Dane County Beyond the Page), continued communications finalizing contract for Drupal hosting, adjusted events display on website (Mount Horeb).
  - LINKcat: attended Codebase Fusion meeting, continued Discovery Layer configuration and theming.  
SCLS website: troubleshooting links in Typepad.
- **Aug. 13-17**
  - Email & phone contacts: shared steps & documentation about adding links, images, and video on website (Pardeeville, Marshall), follow up investigation of test emails for PrinterOn troubleshooting (Sun Prairie), website project scheduling (McFarland).
  - Drupal theming & tweaking: implemented security update for Drupal File (Field) Paths module, continued beta website content staging, styling and configuration (Dane County Beyond the Page), continued communications about contract for Drupal hosting.
  - LINKcat: continued Discovery Layer configuration and theming.
  - Committees: led Library Innovation Subcommittee meeting and posted draft minutes.
  - Professional development: attended Camp Tech-a-talka.
  - SCLS website: tweaked links to staff directory to reduce mis-directed contacts from the public, discussed responding to Google My Business questions, provided explanation for content review emails,