



LSTA Five Year Plan Evaluation Report

Wisconsin Department of Public Instruction LSTA Five Year Plan Evaluation Report (2018-2022)

Report commissioned by:
Division for Libraries and Technology (DLT)

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WiLS
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Evaluation Summary

In Wisconsin, the Department of Public Instruction (DPI) serves as the State Library Administrative Agency (SLAA) and is the recipient and manager of the state's Library Services and Technology (LSTA) Grants to States allotment. Wisconsinites are served by 382 public libraries. Public libraries are voluntary members of 16 regional library systems. At the time of this writing all 382 libraries were members of their regional library system. Local libraries are primarily funded through municipal appropriations and county funding. Library systems are funded through a mix of member library fees and state library system aid, which is administered by DPI. LSTA grant funds were administered to supplement this funding. This evaluation covers a three-year period spanning federal fiscal years (FFY) 2018, 2019, and 2020. As of the completion of this evaluation report, FFY 2020 LSTA budgetary spending had not been finalized at the state level due, in part, to a three-month extension period on the grant year. Amounts included in FFY 2020 were based on active budgetary estimates provided by DPI.

Wisconsin LSTA Budgets for FFY 2018-2020

2018 LSTA Allotment	2019 LSTA Allotment	2020 LSTA Allotment	Total Allotment
\$2,879,721	\$2,917,382	\$3,011,929	\$8,809,032

Wisconsin's 2018-2022 Five Year Plan is robust and extensive, with five goal areas, eight associated objectives (with one or two objectives per goal), and 130 activities recorded in the State Program Report (SPR) for FFY 2018 and 2019. The current plan focused heavily on providing foundational resources to improve libraries, including the development of statewide infrastructure to foster technology updates, the promotion of resource sharing through statewide collaboration, and the provision of continuing education and professional development opportunities for library staff that were in alignment with the plan's identified goals.

The five broad goal statements in the current Five Year Plan for the state are:

- **Goal 1:** *Robust and equitable access to technology through statewide infrastructure, programs, and consulting services.*
- **Goal 2:** *Statewide sharing of information resources and collaboration among libraries to provide equitable and efficient library services for all Wisconsin residents.*
- **Goal 3:** *Increased leadership capacity and utilization of management standards for public libraries.*
- **Goal 4:** *Stronger engagement of public libraries with their communities and utilization of data to actively adapt to community needs.*
- **Goal 5:** *Increased participation of youth and under-represented populations in accessing library programs and services through staff training and shelf-ready resources.*

The "[Guidelines for IMLS Grants to States Five-Year Evaluation](#)" document included ten required questions to include in the report. The section below includes a summary of each question which is more fully detailed in the Evaluation Report commencing on page 6.

A-1: To what extent did Wisconsin’s Five Year Plan activities make progress towards each goal? Where progress was not achieved as anticipated, discuss what factors (e.g. staffing, budget, over-ambitious goals, partners) contributed.

Each goal was assessed through a mixed methods approach, including the use of budgetary and SPR data, focus groups, interviews, and survey data to create a holistic assessment of the plan. Based on the evaluation, the current Five Year Plan was viewed favorably by a diverse representation of stakeholders and experienced notable success, especially in the development of infrastructure for ensuring libraries had access to updated technology (Goal 1) and in providing libraries with access to resources for services and programming in support of their communities (Goal 2). Collectively, funding spending priorities and the survey assessment by library staff and stakeholders from across the state pointed to particular strength and success in these areas. While not all five goals have been fully achieved as of FFY 2020, the state made significant progress on its robust current Five Year Plan, including on the two goals considered partly achieved at the time of the evaluation.

Overall Achievement of State Level Goals

Goal	Self-Assessment Responses*	Evaluator Assessment
1 - Technology	ACHIEVED	ACHIEVED
2 - Resource Sharing	ACHIEVED	ACHIEVED
3 - Leadership Capacity	ACHIEVED	ACHIEVED
4 - Community Engagement	PARTLY ACHIEVED	PARTLY ACHIEVED
5 - Inclusive Services	ACHIEVED	PARTLY ACHIEVED

**Self-assessment responses came from survey data gathered from Wisconsin library staff asking for the degree to which it was perceived each goal and objective had been achieved.*

Goal 1: Technology - Robust and equitable access to technology through statewide infrastructure, programs, and consulting services.

Based on available data, the evaluator determined that Goal 1 was **ACHIEVED**. The primary indicators for this determination were: 1) sufficiently funding the goal in a manner that allowed broad reach, including to under-resourced libraries to ensure access to needed technology, 2) qualitative data gathered through focus groups and interviews which consistently highlighted a broad, statewide reach of this endeavor that provided for robust access to technology through Goal 1 activities, and 3) the self-assessment rating by library stakeholders which indicated achievement.

Goal 2: Resource Sharing - Statewide sharing of information resources and collaboration among libraries to provide equitable and efficient library services for all Wisconsin residents.

Through the course of the evaluation, it was determined that Goal 2 was **ACHIEVED**. The primary reasons for this determination were: 1) sufficiently funding the goal in a manner that allowed broad reach across the state to stakeholders from diverse library types, especially public, school, and academic libraries, 2) the focus group and interview discussions which consistently highlighted the essential nature of many Goal 2 projects (WISCAT, Badgerlink, ILL, digitization support) in allowing libraries to provide services to patrons that would not be possible without access to these resources, and 3) the self-assessment rating by library stakeholders. Goal 2 was the highest rated goal on the survey in terms of progress towards achievement, positioning it as a major area of strength in the current Five Year Plan.

Goal 3: Leadership Capacity - *Increased leadership capacity and utilization of management standards for public libraries.*

Based upon available data, the evaluator determined that Goal 3 was **ACHIEVED**. The primary reasons for this determination were: 1) the volume of library staff who had both participated and found value in the leadership training opportunities associated with this goal offered to them, 2) the perception that the library director and school librarian training opportunities were essential opportunities in increasing leadership capacity for people working in those contexts, and 3) the self-assessment rating provided by stakeholders on the survey.

Goal 4: Community Engagement - *Stronger engagement of public libraries with their communities and utilization of data to actively adapt to community needs.*

Based upon all available data, the evaluator determined that Goal 4 was **PARTLY ACHIEVED**. The primary areas of success for this determination were: 1) the high level of value these activities had as a training opportunity for stakeholders in creating actionable outcomes for participants, and 2) the self-assessment data from the survey for Objective 4.1 which indicated achievement. It is of note that unlike the Goal 4 and Objective 4.2, Objective 4.1 did not include any language related to data utilization and focused solely on increasing awareness about the value of community engagement in library sustainability. The primary area of challenge was the robust data utilization components included in both Goal 4 and Objective 4.2 which stated an intent “to improve local libraries’ ability to create, collect, and analyze local outcomes as part of ongoing data practices in order to actively adapt to community needs.” While stakeholders viewed this part of the goal and objective as important and in alignment with their work, the perception by library staff working in a variety of contexts was that this was an area with room for continued growth to meet full achievement.

Goal 5: Inclusive Services - *Increased participation of youth and under-represented populations in accessing library programs and services through staff training and shelf-ready resources.*

Based upon available data, the evaluator determined that Goal 5 was **PARTLY ACHIEVED**. The primary areas of success for this determination were: 1) the integration of varied training opportunities and shelf-ready resources for inclusive services development into libraries as evidenced by the focus group and interview discussions where multiple, specific Goal 5 activities were discussed organically during each session as both educational and important to library work,

and 2) the self-assessment data from the survey which indicated achievement for both Goal 5 and Objective 5.1. It was clear that the staff training and shelf-ready resources component of this goal had been successfully achieved. The primary area of challenge was due specifically to the wording of Goal 5. Because of the specific metric selected in the goal language of “increased participation of youth and under-represented populations,” the lack of end-user baseline data on participation in these activities made it challenging to assess whether these opportunities moved the needle towards a higher level of participation.

A-2: To what extent did Wisconsin's Five Year Plan activities achieve results that address national priorities associated with the Measuring Success focal areas and their corresponding intents?

Wisconsin did a proactive job in ensuring that their activities were clearly mapped to address the national priorities identified by IMLS and successfully constructed a plan that encompassed the Measuring Success focal areas. Each of the Five Year Plan’s goals and activities were tied to a Measuring Success focal area and corresponding intent which can be reviewed in detail in Appendix A.

A-3: Did any of the following groups represent a substantial focus for your Five-Year Plan activities?

While Wisconsin’s Five Year Plan reached a variety of population segments through targeted activities, no groups met the substantial focus criteria as defined by IMLS.

B-1: How have you used any data from the State Program Report (SPR) and elsewhere to guide the activities included in the Five Year Plan?

Through interviews with DPI staff, it was reported that the data from the SPR was most useful in tracking and managing different activities and related budgetary spends and match funds for projects.

B-2: Specify any modifications you made to the Five Year Plan. What was the reason for the change?

No formal changes or modifications were made to the current Five Year Plan in Wisconsin.

B-3: How and with whom have you shared data from the SPR and from other evaluation resources? How have you used the last Five Year Evaluation to inform data collected for the new Five-Year Evaluation? How have you used this information throughout this five-year cycle?

SPR data was utilized and shared internally with DPI staff, and with the evaluator for purposes of the Five Year Plan evaluation.

C-1: Identify how you implemented an independent Five Year Evaluation using the criteria described in the section of this guidance document called Selection of an Independent Evaluator.

DPI solicited an independent, third-party evaluator through a competitive bid process, based on the guidelines created by IMLS for the Five Year Plan evaluation. Three firms submitted proposals for review by an internal committee. The evaluator selected through this process was [WILS](#).

C-2: Describe the types of statistical and qualitative methods used in conducting the Five Year Evaluation. Assess their validity and reliability.

The evaluator utilized a mixed-methods approach, employing the use of quantitative and qualitative data gathered from: budgetary information, SPR data, focus groups, interviews, and an electronically-disseminated survey tailored to public library and library system staff.

C-3: Describe the stakeholders involved in the various stages of the Five Year Evaluation. How did you engage them?

In partnership with various DPI staff, the evaluator was able to develop a robust evaluation plan that included representation of diverse stakeholders at each stage of the process. In total, over 350 people from a wide variety of roles participated in the evaluation process. Stakeholders included DPI staff, public library staff and directors (including tribal library representation), public library system staff and directors, school librarians/media specialists, academic librarians, special librarians, and other community representatives.

C-4: Discuss how you will share the key findings and recommendations with others.

The evaluation report and associated key findings and recommendations will be shared with DPI administration and staff, as well as the broader library community. The final report will be published on the DPI website, as well as on the IMLS website for public review.

Evaluation Report

Introduction

This evaluation report is based on three years of performance (FFY 2018-2020) related to Wisconsin's 2018-2022 Five Year Plan. This plan included five broad goals which have provided guidance for all LSTA-funded projects and activities for the state:

- **Goal 1:** *Robust and equitable access to technology through statewide infrastructure, programs, and consulting services.*
- **Goal 2:** *Statewide sharing of information resources and collaboration among libraries to provide equitable and efficient library services for all Wisconsin residents.*
- **Goal 3:** *Increased leadership capacity and utilization of management standards for public libraries.*
- **Goal 4:** *Stronger engagement of public libraries with their communities and utilization of data to actively adapt to community needs.*
- **Goal 5:** *Increased participation of youth and under-represented populations in accessing library programs and services through staff training and shelf-ready resources.*

The evaluation design was structured around the Institute for Museum and Library Services (IMLS) "[Guidelines for IMLS Grants to States Five-Year Evaluation](#)," as well as [Wisconsin's 2018-2022 Five Year Plan](#). The evaluation process utilized a mixed-method design that pulled data from a variety of sources to create a holistic picture of the Five Year Plan's strengths and challenges by pairing quantitative and qualitative data to assess the progress towards achievement of each goal. These data sources included: 1) the State Program Report (SPR) data, 2) LSTA budgetary data for FFY 2018, 2019, and 2020 (at the time of this report, FFY 2020 budgetary spending was not finalized in Wisconsin), 3) focus groups with stakeholders across the state, 4) a statewide survey disseminated electronically, and 5) select interviews.

Each goal was assessed through a variety of approaches to measure the progress made between FFY 2018-2020, drawing from the perspectives of diverse stakeholders involved in and/or impacted by LSTA-funded initiatives. Budgetary information for each goal's associated activities was analyzed, in addition to SPR data. This data was complemented by focus group, interview, and survey data collected during the evaluation process. Six focus groups were hosted utilizing a focus group protocol and included approximately 70 participants from a range of backgrounds, including staff from DPI, public library staff and directors, library system staff and directors, school librarians and media specialists, special librarians, and partner organization representatives. The survey was disseminated electronically through a variety of avenues with 287 responses. Public library staff and directors and public library system staff and directors were the primary targeted group. It is of note that a group missing from evaluation efforts was end users of library services. No intentional data collection efforts were made to assess the impacts of Five Year Plan activities on end users themselves during FFY 2018-2020. Rather, the current plan activities focused heavily on impacting end users through funding that targeted libraries and their staff instead of directly to patrons themselves. This was also influenced by the structure of libraries in Wisconsin where funding typically moves from DPI as the SLAA to library systems, who then manage how funds

reach individual libraries. In this context, end user data would be collected primarily at the “frontline” library staff level and be reported back to the library system through different reporting mechanisms that do not currently exist for collecting this data as part of the LSTA administration process.

When looking at the Five Year Plan comprehensively, stakeholders perceived the goals as being broad and in alignment with their own work at individual libraries and organizations. Participants in the evaluation process indicated the goals felt relevant, timely, and flexible enough to weather the unexpected and unprecedented COVID-19 pandemic and its impact on communities -- libraries included. The strengths of the current plan surrounded Goal 1, 2, and 3 activities. While broad and expansive, these goals identified clear outputs to indicate achievement. Both Goals 4 and 5 made significant progress and resonated strongly with various stakeholders as being of high importance and in alignment with initiatives at organizations across the state; however, a simultaneous concern related to the goals’ breadth from stakeholders was that it might be difficult to measure success since many participants indicated these specific goals are continuous processes they were engaged in rather than having a clear endpoint for achievement.

Background

The formula for the LSTA Grants to State program is driven significantly by population size. In 2020, Wisconsin was the 21st most populous state in the US with over 5.8 million people and steady growth year over year based on US Census data estimates. For FFY 2018-2020, Wisconsin saw an average population growth of .4% per year. With an LSTA allotment of \$3,011,929 in 2020, there was an average of \$0.52 per Wisconsinite accounted for annually in the LSTA budget. Through their Five Year Plan, DPI has leveraged this small per person amount into significant achievements in providing library and information services to the state.

A significant challenge facing all states in the current Five Year Plan cycle was the COVID-19 pandemic which continues to impact the nation as of the completion of this evaluation report. The pandemic impacted libraries significantly in Wisconsin, leading to long periods of time where physical facilities were closed, prompting rapid transitions in service provision. In spite of this incredibly disruptive event, library staff working in a variety of contexts in Wisconsin continued to provide timely services to their communities and proved adaptable in pivoting to meet emerging needs in their communities as much as possible. Libraries moved programming to virtual platforms, expanded promotion of digital resources such as eBooks and audiobooks, and moved swiftly to address the “digital divide” exacerbated by circumstances in which it became increasingly obvious that internet connectivity was essential. DPI staff also worked extensively to support libraries during this event through similar pivots at the state level. Many training opportunities, for example, continued to be provided to library staff across the state through virtual engagement opportunities. The expansion of statewide infrastructure to ensure technology access included in the current Five Year Plan became particularly prescient in light of these events and proved both successful and necessary by ensuring libraries had the technology they needed to remain open to their communities virtually, even when physical spaces had to be closed.

It is a notable strength that the current Five Year Plan for the state continued to remain relevant and timely in this unexpected landscape. While beyond the scope of this evaluation report, the COVID-19 pandemic also brought additional emergency funds to the state of Wisconsin through IMLS CARES Act Grant Funding. The reason to include this item in this discussion was to acknowledge the fact that the current Five Year Plan also helped successfully guide the spending of these monies in addressing pandemic-related concerns for libraries across the state. This pointed also to the timeliness and adaptability of the current plan in remaining agile in a very challenging and dynamic environment. During focus groups, many conversations centered positively on the fact that DPI was able to facilitate LSTA activities effectively throughout the pandemic and utilized funds to support libraries and their communities in continuing to provide important services. The fact that significant achievement and progress were made on the 2018-2022 plan in spite of the pandemic remained a theme for stakeholders throughout the data-gathering phase of the evaluation process.

A. Looking Back: Retrospective Questions

A-1: To what extent did Wisconsin’s Five Year Plan activities make progress towards each goal? Where progress was not achieved as anticipated, discuss what factors (e.g. staffing, budget, over-ambitious goals, partners) contributed.

Goal 1: Technology

Robust and equitable access to technology through statewide infrastructure, programs, and consulting services.

Goal Achieved

Overall Goal Assessment: Goal 1 of Wisconsin’s Five Year Plan focused on providing libraries with equitable access to technology through a statewide effort. This goal included a specific objective: “Objective 1.1: Assist libraries and systems in using technology, providing access, and coordinating the use of technology statewide.” This goal and associated objective were pursued through a number of LSTA-funded projects and endeavors detailed in the table below.

Projects and Activities Expenditures: Goal 1 (FFY 2018-2020)

Project	Expenditure
Statewide Technology Consulting Services	\$90,864
Statewide Coding Initiative in Public Libraries	\$12,702
Increase Capacity for Technology Tools and Resources	\$1,034,999
Cooperative Children’s Book Center Database Development (CCBC)	\$46,381
Tech Days CE Program	\$4,000

Project	Expenditure
WPLC Biblioboard	\$24,000
Wisconsin Schools Digital Library Consortium (WSDLC)	\$18,150
Automate Southwest Wisconsin Copy Cataloging (pilot)	\$6,400
Cybersecurity	\$31,930
Connectivity Grants	\$99,015
Infrastructure for Backup and Digitization Archives Storage	\$133,475
Total Goal 1 Project & Activity Expenditures (FFY 2018-2020)	\$1,501,916

Goal 1 was assessed through a variety of approaches to create a holistic picture of the progress made between 2018-2020; these included SPR data, budgetary data, focus group and interview discussions, and a survey. Based on analysis of this data, the evaluator determined that Goal 1 has been achieved. Indicators of this success from all available data point to meaningful activities associated with this goal that have led to robust and equitable access to technology facilitated by statewide infrastructure during the 2018-2020 period.

Goal Discussion: The associated projects and activities of Goal 1 were highly funded, making up 17% of the FFY 2018-2020 LSTA spending and making it the second most funded goal in the Five Year Plan. The biggest spending associated with this goal was the activity, “Increase Capacity for Technology Tools and Resources.” This is also an activity that was mentioned as valuable during focus groups. While a number of different stakeholders mentioned this activity explicitly during focus groups, public library system staff were the most vocal about the value of these activities and indicated that these monies contributed greatly to their ability to ensure Wisconsin libraries of all sizes were able to have access to a “baseline” of needed technology. Especially when considering smaller, rural libraries in the state working with limited operating budgets, LSTA-funds related to this goal allowed for technology updates that either would not have been otherwise possible, or freed up monies in the budget for other initiatives that would not have been available otherwise. While not end-user-oriented specifically, these updates improved library operations and therefore the experience for library patrons. These updates were particularly pertinent during the COVID-19 health pandemic when technology and internet connectivity became even more essential in service provision.

“When COVID hit and libraries shut down, and in the rural areas, Internet access was a huge problem. This is a strange kind of combination, because inner city folks also had that same problem where their only place for connectivity [was the library] since there are under-resourced neighborhoods in Milwaukee. If you look at the Census information, one out of four people live in poverty. And so I think there could be some synergy moving forward when we think about the needs of our rural communities and the needs of our inner city communities in regards to internet connectivity, and really trying to do whatever we can to beef that up. We all know that today. You can’t really apply for a job unless you have internet connectivity. So where do you even start if those resources aren’t available?”

- Focus Group Participant

Based upon available data, the evaluator determined that Goal 1 was **ACHIEVED**. The primary reasons for this determination were: 1) sufficiently funding the goal in a manner that allowed broad reach, including to under-resourced libraries, to ensure access to needed technology, 2) the focus group discussions which consistently highlighted a broad, statewide reach of this endeavor that provided for robust, statewide access to technology through Goal 1 activities, and 3) the self-assessment rating by library stakeholders.

Goal 1 Achievement: Self-Assessment | Scale: Not Achieved (1) to Achieved (3)

Stakeholder	Weighted Average
Library Staff (n=51)	2.00
Library Director (n=81)	2.18
Library System Staff (n=18)	1.89
Library System Director (n=7)	2.17
Other (n=20)	2.16
Aggregated Total	2.09

Objective 1.1 Achievement: Self-Assessment | Scale: Not Achieved (1) to Achieved (3)

Stakeholder	Weighted Average
Library Staff (n=51)	2.22
Library Director (n=81)	2.25
Library System Staff (n=18)	2.33
Library System Director (n=7)	2.17
Other (n=20)	2.32
Aggregated Total	2.26

Goal 2: Resource Sharing

Statewide sharing of information resources and collaboration among libraries to provide equitable and efficient library services for all Wisconsin residents.

Goal Achieved

Overall Goal Assessment: Goal 2 of Wisconsin’s Five Year Plan aimed to build a statewide system that provides information sources to Wisconsin residents through library collaboration. This goal included two objectives: “Objective 2.1: Create, maintain, and continuously improve on a platform and system to facilitate the sharing of content and resources across the state for all libraries in all

locations” and “Objective 2.2: Encourage a more informed society by providing access to historical and current civic content.” This goal and associated objectives were pursued through a number of LSTA-funded projects and endeavors detailed in the table below.

Projects and Activities Expenditures: Goal 2 (FFY 2018-2020)

Project	Expenditure
WISCAT Platform and Staff	\$1,007,981
Interlibrary Loan (ILL) Staff + Badgerlink Authentication, Federated Searching, and Staff	\$1,617,734
Funding Support for Statewide Delivery Service	\$250,000
Support Local Costs of Digitization Efforts	\$42,000
Support of Recollection Wisconsin and Digital Public Library of America (DPLA) Services	\$104,000
Statewide ILL Meeting	\$5,297
Wisconsin Public Library Consortium (WPLC) Pandemic Collection Support	\$600,000
WSDLC Digital Library Pandemic Collection Support	\$92,000
Archive of Wisconsin Newspapers Metadata	\$111,000
Standalone ILS to Share System ILS Grants	\$299,081
Public Library System Redesign (PLSR)	\$72,162
WPLC E-book Data Collection	\$5,000
Total Goal 2 Project & Activity Expenditure (FFY 2018-2020)	\$4,206,255

Like all of the goals included in this evaluation, Goal 2 was assessed through a variety of approaches including SPR data, budgetary data, focus group and interview discussions, as well as a survey. Based on analysis of this data, the evaluator determined that Goal 2 has been achieved. Indicators of this success from available data point to meaningful and productive projects and activities associated with this goal.

Goal Discussion: The associated projects and activities of Goal 2 were highly funded, making up 48% of the FFY 2018-2020 LSTA spending and making it the most funded goal in the 2018-2022 Five Year Plan. The biggest spends associated with this goal were the WISCAT, BadgerLink, and Interlibrary Loan (ILL) services which included both software and staffing. Many of the projects associated with Goal 2 are perceived by library staff and directors as “foundational resources” to the work of libraries across the state. This is also a goal where the associated activities have a clear, large reach to all types of libraries through singular projects, especially the services

associated with Badgerlink and WISCAT. [Badgerlink](#) is a foundational collection designed to provide Wisconsin residents with access to licensed content that augments other content provided by entities like K-12 schools, public libraries, and institutions of higher education. [WISCAT](#) is a platform for library resource sharing that involves a physical union catalog, a virtual union catalog, and an interlibrary loan management module. During the focus group sessions, essentially all participants — regardless of their role — indicated familiarity with these platforms and viewed them as essential resources or services for the work they do with patrons and end-users in a variety of contexts. These activities also facilitated a high level of connection and collaboration between school, academic, and public libraries.

It is also of note that WISCAT and Badgerlink were ongoing endeavors in existence before the current Five Year Plan was written, rather than novel projects that commenced with the current plan. This meant that these platforms were already established, staffed, and were known across the state by library staff working in a variety of contexts, as well as by community partners. Unlike some other LSTA-funded initiatives, the legacy nature of these resources provided additional strength in terms of visibility and familiarity and were activities stakeholders indicated they expected to continue to have access to as an essential resource for their work.

“So can I just talk about BadgerLink for a second? I don't know that a lot of my smaller academic library colleagues will be able to hack it without BadgerLink. So I think it's been a tremendous resource for many of us across systems, and to have that available to our students. [...] I think public libraries probably don't even know that we use it at the academics, but we rely heavily on BadgerLink. Probably our most used resource.” - Focus Group Participant

A number of other Goal 2 activities came up consistently and organically across the focus groups, indicating that they are valuable LSTA-funded initiatives. These included: 1) the state-managed Interlibrary Loan (ILL) service, 2) the statewide delivery service, 3) digitization support, 4) electronic historical archival resources and support through Recollection Wisconsin, and 5) investment in digital collection development for both the Wisconsin Public Library Consortium (WPLC) and the Wisconsin Schools Digital Library Consortium (WSDLC) when demands on these collections increased due to the pandemic. It became clear through the data collection and analysis phase of the evaluation that efforts associated with this goal had been successful and many of the activities remained essential to a wide variety of stakeholders. However, it was also of note that many stakeholders did not realize that these resources were funded through LSTA funds. A number of participants raised questions about the sustainability of these efforts through this particular funding stream, and the extent to which funding these foundational resources consistently through LSTA funds impacted the ability to have monies for other novel projects given that this goal alone represents approximately half of the LSTA allotment spending for FFY 2018-2020.

Goal 2 is an area of strength in ensuring smaller, often under-resourced libraries have access to a variety of resources that their budgets and staffing could not accommodate. This was discussed in a number of focus groups, especially in relation to digitization efforts and Recollection Wisconsin. One focus group participant shared public library system-level data which indicated over 800,000 items viewed on the Recollection Wisconsin platform through member libraries as of July 2021 and

shared that, without access to this support, patrons would likely not have been able to otherwise discover any of that content.

“I just wanted to share - one of my colleagues, who does digitization - so she wanted me to share about in the resource sharing piece of [the focus group] about local digitization projects. She was talking about the costs involved with providing system level staff to support library’s projects, about Recollection Wisconsin and the DPLA platforms, [how] having the expertise of the Recollection Wisconsin administrators available is essential to making these local history materials accessible and discoverable.” - Focus Group Participant

Based upon available data, the evaluator determined that Goal 2 was **ACHIEVED**. The primary reasons for this determination were: 1) sufficiently funding the goal in a manner that allowed broad reach across the state to stakeholders from diverse library types, especially from public, school, and academic libraries, 2) the focus group discussions which consistently highlighted the essential nature of many Goal 2 projects (WISCAT, Badgerlink, ILL, digitization support) in allowing libraries to provide services to patrons that would not be possible without access to these resources, and 3) the self-assessment rating by library stakeholders. Goal 2 was the highest rated goal on the survey in terms of progress towards achievement, pointing to it being a major area of strength in the current Five Year Plan.

Goal 2 Achievement: Self-Assessment | Scale: Not Achieved (1) to Achieved (3)

Stakeholder	Weighted Average
Library Staff (n=51)	2.31
Library Director (n=81)	2.33
Library System Staff (n=18)	2.33
Library System Director (n=7)	2.33
Other (n=20)	2.40
Aggregated Total	2.33

Objective 2.1 Achievement: Self-Assessment | Scale: Not Achieved (1) to Achieved (3)

Stakeholder	Weighted Average
Library Staff (n=51)	2.28
Library Director (n=81)	2.24
Library System Staff (n=18)	2.29
Library System Director (n=7)	2.33
Other (n=20)	2.26
Aggregated Total	2.26

Objective 2.2 Achievement: Self-Assessment | Scale: Not Achieved (1) to Achieved (3)

Stakeholder	Weighted Average
Library Staff (n=51)	2.09
Library Director (n=81)	2.05
Library System Staff (n=18)	2.14
Library System Director (n=7)	2.00
Other (n=20)	2.47
Aggregated Total	2.11

Goal 3: Leadership Capacity

Increased leadership capacity and utilization of management standards for public libraries.

Goal Achieved

Overall Goal Assessment: Goal 3 focused on increasing leadership capacity for public libraries and their staff and volunteers. This goal included two objectives: “Objective 3.1: To provide leadership and management training and consultation services for library staff and volunteer leaders” and “Objective 3.2: To develop clear and useful library standards and provide an interactive interface to enable real time and consistent measurement and comparisons of progress in meeting state standards.” This goal and associated objective were pursued through a number of LSTA-funded projects and endeavors detailed in the table below.

Projects and Activities Expenditures: Goal 3

Project	Expenditure
Annual Training Orientation for New Library Directors	\$21,364
Director of Public Library Development Team + Public Library Data and Finance Consultant	\$544,865
Trustee Training	\$3,000
School Librarian Leadership Training - Workgroup	\$2,904
School Librarian Leadership Training	\$40,920
Wild Wisconsin Winter Web Conference	\$2,000
ARSL Conference Scholarships	\$9,505
Library Workforce Development Marketing	\$5,844
Total Goal 3 Project & Activity Expenditure (FFY 2018-2020)	\$630,402

The success of Goal 3 was examined through the same evaluative process outlined for the previous goals. Based on analysis of this data, the evaluator determined that Goal 3 has been achieved. Indicators of success from all associated data highlighted that the projects and activities associated with this goal were both productive and of value to diverse stakeholders in achieving the goal's intent.

Goal Discussion: Goal 3's associated projects and activities made up 7% of the FFY 2018-2020 LSTA spending, ranking it last in terms of goal funding. Outside of personnel, the biggest activity-related spends associated with this goal went to training library staff — specifically new public library directors and school librarians.

Goal 3's projects and activities were mentioned by focus group participants frequently and positively, highlighting a key theme across the focus group sessions of the value of training opportunities for library staff. The Annual Training for New Library Directors — also known as the "New Director Bootcamp" — was identified across all focus groups as a very important training opportunity and was one of the LSTA-funded activities cited most often. This annual training provides new library directors with key information to create a baseline of knowledge across the state for all public library directors and also provides the opportunity for directors to network.

"[Access to these LSTA-funded projects] really just broadens and enriches our experience for our member libraries. ...[I]t's become very convenient and it's something that, honestly, I didn't realize how much we were relying on it to, to fulfill some of our continuing education requirements and to do some of that networking. It's just very convenient to take advantage of, and that ease of use makes it just so relevant."
- Focus Group Participant

In addition, people appreciated the Wild Wisconsin Winter Web Conference and the scholarships that allowed them to attend other conferences like the Association for Rural and Small Libraries (ARSL) annual meeting. In comparison with some of the other programmatic spends associated with other goals in the Five Year Plan, it was of note that these training opportunities are less costly than many of the other LSTA-funded endeavors and were particularly remarkable to public library and public library system staff and directors. However, a related concern that arose was how accessible these training opportunities might be for all public library staff, especially for those in more rural or small libraries where limited staffing capacity can make attending conferences and other training opportunities challenging due to funding and time constraints. Outside of staffing capacity and turnover, the impacts of the COVID-19 pandemic were also barriers to attending training opportunities, especially for library staff working in K-12 settings where obligations to move classes online for students for virtual learning were overwhelming.

"When you're talking about the Compassion Resilience training, I was part of our group. And we've [...] reached out to the other libraries in our library service, and I think part of the issue [with getting staff to attend] we're having right now is staffing [capacity]. Everybody's just so overwhelmed. I've done some of the Compassion Resilience training here just in my own library with our staff. But we just have to come up with a better way to make it more accessible. It's in some way because we have libraries that would like to be able to do it but they just don't have the time there. They don't have staff meetings, because they don't have the time to do it, [...]and maybe that's something that can be built into, you know, to the grant that they offer libraries. [...] And we, - the libraries - don't necessarily have the time to all [participate]. So we

have got to come up with a way. I've done some soul searching on that, and trying to figure out how we can make that work. You know, a lot of times it's having to close a library for half a day or something like that. And how do you make that work, you know, in your community?" - Focus Group Participant

Based upon available data, the evaluator determined that Goal 3 was **ACHIEVED**. The primary reasons for this determination were: 1) the volume of library staff who had participated and found value in the leadership training opportunities associated with this goal, 2) the perception that the library director and school librarian training opportunities are essential opportunities in increasing leadership capacity for people working in those contexts, and 3) the self-assessment rating provided by stakeholders on the survey.

Goal 3 Achievement: Self-Assessment | Scale: Not Achieved (1) to Achieved (3)

Stakeholder	Weighted Average
Library Staff (n=51)	2.03
Library Director (n=81)	2.06
Library System Staff (n=18)	2.00
Library System Director (n=7)	2.50
Other (n=20)	2.07
Aggregated Total	2.06

Objective 3.1 Achievement: Self-Assessment | Scale: Not Achieved (1) to Achieved (3)

Stakeholder	Weighted Average
Library Staff (n=51)	2.00
Library Director (n=81)	2.23
Library System Staff (n=18)	1.93
Library System Director (n=7)	2.50
Other (n=20)	2.21
Aggregated Total	2.15

Objective 3.2 Achievement: Self-Assessment | Scale: Not Achieved (1) to Achieved (3)

Stakeholder	Weighted Average
Library Staff (n=51)	2.05
Library Director (n=81)	2.01

Stakeholder	Weighted Average
Library System Staff (n=18)	1.88
Library System Director (n=7)	2.50
Other (n=20)	2.31
Aggregated Total	2.06

Goal 4: Community Engagement

Stronger engagement of public libraries with their communities and utilization of data to actively adapt to community needs.

Goal Partly Achieved

Overall Goal Assessment: Wisconsin’s Five Year Plan Goal 4 centered on the role of data-driven public library engagement in communities in an effort to address public need(s). This goal included two specific objectives: “Objective 4.1: To increase awareness of community engagement as critical to public library sustainability and to provide training and resources to facilitate the effective community engagement practices of libraries with their local communities” and “Objective 4.2: To improve local libraries’ ability to create, collect, and analyze local outcomes as part of ongoing data practices in order to actively adapt to community needs.” This goal and associated objective were pursued through a number of LSTA-funded projects and endeavors detailed in the table below.

Projects and Activities Expenditures: Goal 4

Project	Expenditure
Adult and Community Services Consultant	\$239,232
Community Engagement Statewide Training	\$223,175
Outcome Measurement Grants and Support	\$32,605
Community Engagement Needs Assessment	\$11,991
Community Demographic Research Study (“Leveraging Library Data”)	\$20,650
Harwood Innovator Lab	\$8,635
Professional Development Research Study (“Barriers to Participation”)	\$22,600
WebJunction	\$37,080
Continuing Education on Serving Older Adults	\$18,272
Wisconsin Libraries Transforming Communities (WLTC) Data Project	\$4,875

Project	Expenditure
Lead the Way Summit	\$15,600
Total Goal 4 Project & Activity Expenditure (FFY 2018-2020)	\$634,715

Goal 4 was assessed through analysis of the SPR and budgetary information, as well as focus group, interview, and survey data gathered as part of the evaluation process. Based on analysis of this data, the evaluator determined that Goal 4 has been partially achieved and is on track to continue to make valuable progress over the remaining two years of the current Five Year Plan cycle. Indicators of success from all associated data highlighted that the projects and activities associated with this goal were both meaningful and important to a wide variety of stakeholders at the director and staff level working in a diverse representation of libraries and community organizations. However, a limitation in reaching full achievement of the goal was the data utilization component of this goal.

Goal Discussion: Goal 4's associated projects and activities made up 7% of the FFY 2018-2020 LSTA spending, ranking it fourth in terms of per-goal spending. The biggest spend associated with this goal outside of personnel was the statewide community engagement training.

Goal 4 was named frequently throughout both the focus groups and interviews as an endeavor of paramount importance, especially in the wake of the COVID-19 health pandemic which necessitated quick, unanticipated pivots for libraries in continuing to reach and serve their communities while grappling with unexpected facility closures and pressing community needs around internet connectivity and information access. For this goal specifically, a theme emerged during focus groups and interviews of a clear alignment with national efforts in libraries and an emphasis on community engagement and partnerships. Simultaneously, a key concern named by both focus group and interview participants was that community engagement efforts and the associated objective of data utilization should be less of a "standalone" goal/activity and more of a thread woven into the entire Five Year Plan.

"With all of these initiatives, particularly community engagement and leadership, we found some really good partnerships with different systems and DPI. [There is] a lot of interest in those areas, not just in Wisconsin, but from a national perspective as well. Especially, [when] we had a community engagement event last year, and it was very well received, not just by our group of Wisconsin Libraries Transforming Communities folks, but also nationally -- we had a lot of national interest in that. So I think that aligns really well with not just what Wisconsin is doing, but what national interests [are] in public libraries as well." - Focus Group Participant

From a training standpoint, opportunities to really learn what it means to practically engage communities through a library-oriented lens was viewed by library staff as important, timely, and a shift in thinking for librarianship that required continued support. As stated by one participant, "the whole idea of truly engaging with the community, really figuring out what the community's aspirations and needs are, is something that is a kind of new way of doing business for us... and I think that's something that's going to be continuing and needs continued support." Through this lens, the focus group participants perceived the statewide community engagement project, the

[Wisconsin Libraries Transforming Communities](#) (WLTC) cohort, as a successful opportunity for library staff to partner with a community organization for data-related community engagement training and implementation. This cohort served as a model for the intent of Goal 4 and resulted in opportunities for participants to collect and use data to inform decision-making at libraries in support of their communities. A number of stakeholders named it as being a valuable learning opportunity that produced clear progress towards community engagement since the nature of the project involved explicitly building a project with a community partner in service of the broader public. WLTC also provided significant hands-on training related to finding and using data in support of projects pursued through the cohort. However, outside of this specific cohort, there were remaining deficiencies in data utilization throughout the goal area.

A challenge associated with fully achieving this goal was the data utilization component. Focus groups identified growth opportunities in the area of increasing data capacity for libraries; additionally, survey participants rated this objective lowest in terms of movement towards full achievement. Participants working in various positions and libraries stated a desire for more available outcomes data, both from a transparency and accountability standpoint and also for helping libraries consider evidence-based ideas for implementation in their own organizations. Numerous participants identified the need for increased data-related training opportunities and shelf-ready data resources for carrying out their own work, while also highlighting concern that such efforts should be carried out simultaneously at the state level in the implementation of the Five Year Plan. For example, participants stated they would like to have access to outcomes data for a variety of LSTA-funded projects available in a single repository for their review. Data and case studies on successful initiatives at other libraries could help library staff determine local projects, inform priority spending in their budgets, and could create a model for additional data collection and analysis.

Based upon available data, the evaluator determined that Goal 4 was **PARTLY ACHIEVED**. The primary areas of success for this determination were: 1) the high level of value these activities had as a training opportunity for stakeholders in creating actionable outcomes for participants, and 2) the self-assessment data from the survey for Objective 4.1 which indicated achievement. It is of note that unlike the Goal 4 and Objective 4.2, Objective 4.1 did not include any language related to data utilization and focused solely on increasing awareness about the value of community engagement in library sustainability. The primary area of challenge was the data components of Goal 4 and Objective 4.2. While stakeholders view this part of the goal as important and in alignment with their work, library staff working in a variety of contexts continue to view this as an area with room for growth to meet full achievement.

Goal 4 Achievement: Self-Assessment | Scale: Not Achieved (1) to Achieved (3)

Stakeholder	Weighted Average
Library Staff (n=51)	1.91
Library Director (n=81)	1.94
Library System Staff (n=18)	1.75

Stakeholder	Weighted Average
Library System Director (n=7)	2.00
Other (n=20)	2.06
Aggregated Total	1.93

Objective 4.1 Achievement: Self-Assessment | Scale: Not Achieved (1) to Achieved (3)

Stakeholder	Weighted Average
Library Staff (n=51)	1.91
Library Director (n=81)	2.01
Library System Staff (n=18)	1.79
Library System Director (n=7)	2.40
Other (n=20)	2.21
Aggregated Total	2.00

Objective 4.2 Achievement: Self-Assessment | Scale: Not Achieved (1) to Achieved (3)

Stakeholder	Weighted Average
Library Staff (n=51)	1.85
Library Director (n=81)	1.81
Library System Staff (n=18)	1.60
Library System Director (n=7)	1.60
Other (n=20)	2.00
Aggregated Total	1.82

Goal 5: Inclusive Services

Increased participation of youth and under-represented populations in accessing library programs and services through staff training and shelf-ready resources.

Goal Partly Achieved

Overall Goal Assessment: Goal 5 in the Five Year Plan focused on developing programs and activities that increase the participation of both youth and under-represented populations, specifically through the use of library staff training and the provision of shelf-ready resources. This

goal included a single objective: “Objective 5.1: To provide quality training, programs, and information regarding identifying, attracting, and effectively serving the needs of youth and all community members, including individuals or groups for whom using the library is difficult or limited.” This goal and associated objective were pursued through a number of LSTA-funded projects and endeavors detailed in the table below.

Projects and Activities Expenditures: Goal 5

Project	Expenditure
Youth and Inclusive Services Consultant	\$171,309
Summer Library Program	\$13,512
Youth Services Development Institute	\$15,026
Inclusive Services Training	\$7,415
System CE Support: Consulting Areas	\$9,499
State and System Services Meeting	\$5,797
Connect and Create: Student as Community Members	\$42,223
Virtual Reading Program Platform (Beanstack)*	\$326,930
School and Library Collaboration Subawards	\$66,914
Librarian’s Guide to Homelessness Training	\$39,998
Compassion Resilience Training	\$6,000
“Books in Print” for Wisconsin Correctional Facilities	\$32,550
Total Goal 5 Project & Activity Expenditure (FFY 2018-2020)	\$737,173

** Beanstack has overlap with Goal 2: Resource Sharing*

Goal 5 was assessed through the same analysis process as the previous goals included in this evaluation. Based on analysis of this data, the evaluator determined that Goal 5 has been partly achieved and is on track to continue to make valuable progress over the remaining two years of the current Five Year Plan cycle. Indicators of success from all associated data highlighted that the projects and activities associated with this goal were both meaningful and important to a wide variety of stakeholders. However, a limitation in reaching full achievement of the goal was a lack of end-user/patron data.

Goal Discussion: The associated projects and activities of Goal 5 made up 8% of the FFY 2018-2020 LSTA spending, ranking it third in terms of the amount of LSTA funding spent. The biggest spend associated with this goal was on the platform Beanstack, which is designed to allow for virtual summer and school-year reading programs. This platform was viewed very positively by library staff from both public and school libraries.

“One thing that's been huge for us - and we think it will continue to be huge - is Beanstack. Just kind of sweating the fact that we might lose it after 2023 and not be able to afford it. For our community that's brought a lot of people together that we didn't see in the past.”

- Focus Group Participant

The perception of this goal by stakeholders was that it is timely, important, and in alignment with work people are engaged in across the state. Stakeholders found the Youth and Inclusive Services Consultant position, as well as access to various inclusive services training opportunities and resources, of high value to their work. Specifically, both the Librarians Guide to Homelessness Training and the Compassion Resilience Training were mentioned unprompted in each focus group as meaningful and informative. In addition, these training opportunities were built around a “train the trainer” model where attendees were expected to bring the content back to their individual organizations. Library staff at all levels viewed this model as a strength and believed it increased the success of these programs by ensuring the information was utilized broadly. Like the community engagement focus outlined in Goal 3, inclusion was perceived by stakeholders as being a thread woven throughout the work they do, rather than a standalone goal or activity.

In addition, it was indicated through the data-gathering process that COVID-19-related closures of physical spaces actually allowed some of these opportunities to be engaged with more fully - specifically the Inclusive Services Assessment. This training was mentioned in multiple focus groups as being important and timely, however, it was also mentioned that engagement with and implementation of it was time-intensive. Anecdotally, an unexpected outcome of physical space closure was the ability to free up some staff to utilize the time to complete this activity at their library, pointing to the potential of finding other ways to support libraries in finding the capacity to fully engage with professional development opportunities.

“One thing that we were able to do when we were not able to offer services in person was go through the Inclusive Services Assessment that I believe was funded, at least in part, by the LSTA. And that was a hugely important thing for our library. I mean, we made a big deal out of it. We got our board involved, our staff involved, focus group members, and the community involved with [answering] where the library was able to make progress and where we have a lot of room to grow.”

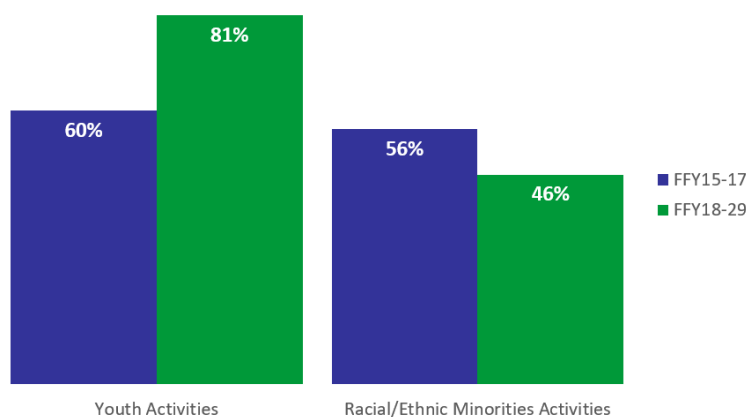
- Focus Group Participant

From an evaluative lens, a challenge in assessing the achievement of this goal was the limited assessment and evaluation data gathered during the FFY 2018-2020. Since the goal is written with a metric in mind of “increased participation of youth and under-represented populations” there was a need to establish a baseline of participation to compare how these programs and associated spends moved or did not move the proverbial needle. This data was not gathered during FFY 2018-2020, making it difficult to assess if Goal 5 had been fully achieved as written. This also does not take into account the COVID-19 health pandemic which had a significant impact on how the general public was able to participate in library-facilitated opportunities.

While there is no available data to assess if and how much these activities increased youth and under-represented populations' *participation* in library programs and services, there is evidence

that targeted activity *offerings* did shift audience focus during the current Five Year Plan, especially towards activities for youth. Of the 130 activities included in the FFY 2018 and 2019 data, 26 were targeted activities focused on providing services to a specific segment of the population versus the general public. 92% of these targeted activities were associated specifically with Goal 5. 81% (21) of the targeted activities were specifically targeted at youth under the age of 18. By comparison, in 2015-2017, there were 103 targeted activities included in the SPR data with 60% (62) specifically targeted at youth under the age of 18. While the volume of targeted activities decreased from an average of 34 per year for FFY 2015-2017 to 13 in FFY 2018-2019, there was an increase in the percentage of those activities focused on youth. However, simultaneously, while the percentage of youth programs did increase compared to the previous three years of SPR data, the number focused on racial and ethnic minorities decreased from 56% (58) in FFY 2015-2017 to 46% (12) in FFY 2018-2019. This points to a strength in offerings specifically for youth based in the current Five Year Plan

Percent of Targeted Activities Focused on Youth and Racial/Ethnic Minorities: Time Comparison



During focus group discussions, there were a number of participants who commented that they hoped to see a transition to a greater focus on activities focused specifically on adults in the future Five Year Plan and that LSTA-funded initiatives had been heavily focused on children and youth. These findings were supported by survey data which asked respondents to rate to what extent different segments of the population should be targeted by IMLS funds in the future. In terms of how to prioritize future funding, children and youth were ranked in the lowest three groups, along with immigrants and refugees.

Based upon available data, the evaluator determined that Goal 5 was **PARTLY ACHIEVED**. The primary areas of success for this determination were: 1) the integration of different training opportunities and shelf-ready resources for inclusive services development into libraries as evidenced by the focus group discussions where the Librarian’s Guide to Homelessness, Compassion Resilience training, and access to the Inclusive Services Consultant and Guide came up organically during each session as both educational and important to library work, and 2) the self-assessment data from the survey which indicated achievement for both Goal 5 and Objective 5.1. The primary area of challenge was due specifically to the wording of Goal 5. Because of the specific metric selected in the goal language of “increased participation of youth and under-represented populations,” the lack of end-user baseline data on participation in these

activities made it challenging to assess if these opportunities moved the needle towards a higher level of participation.

Goal 5 Achievement: Self-Assessment | Scale: Not Achieved (1) to Achieved (3)

Stakeholder	Weighted Average
Library Staff (n=51)	2.07
Library Director (n=81)	2.05
Library System Staff (n=18)	2.08
Library System Director (n=7)	2.33
Other (n=20)	1.94
Aggregated Total	2.06

Objective 5.1 Achievement: Self-Assessment | Scale: Not Achieved (1) to Achieved (3)

Stakeholder	Weighted Average
Library Staff (n=51)	2.02
Library Director (n=81)	2.11
Library System Staff (n=18)	2.13
Library System Director (n=7)	2.33
Other (n=20)	2.00
Aggregated Total	2.08

A-2: To what extent did Wisconsin's Five Year Plan activities achieve results that address national priorities associated with the Measuring Success focal areas and their corresponding intents?

The SLAA in Wisconsin did a proactive job in ensuring that their plan's activities were clearly mapped to address the national priorities identified by IMLS and were successfully able to construct a plan that encompassed the Measuring Success focal areas. Each of the Five Year Plan's goals and activities were tied to a Measuring Success focal area and corresponding intent:

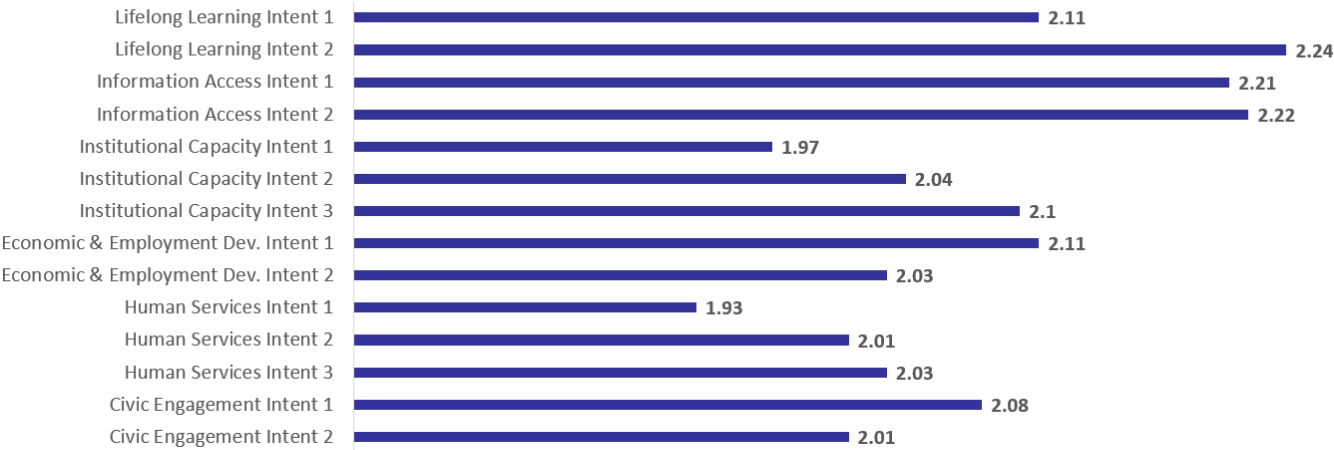
- Goal 1 programs and activities were crosswalked to three IMLS focal areas: 1) lifelong learning, 2) information access, and 3) institutional capacity.
- Goal 2 programs and activities were crosswalked to two IMLS focal areas: 1) information access and 2) institutional capacity.
- Goal 3 programs and activities were crosswalked to one focal area: 1) institutional capacity.

- Goal 4 programs and activities were crosswalked to two IMLS focal areas: 1) institutional capacity and 2) civic engagement.
- Goal 5 programs and activities were crosswalked to three IMLS focal areas: 1) institutional capacity, 2) civic engagement, and 3) human services.

A full chart of the Five Year Plan’s goals and activities mapped to the focal areas and intents can be viewed in Appendix A.

As part of the survey disseminated for the evaluation, respondents were asked to consider to what extent Wisconsin’s Five Year Plan activities addressed the Measuring Success focal areas and intents through the course of LSTA-funded activities. Information Access and Lifelong Learning were the two highest rated focal areas. These two focal areas were mapped to the two goals perceived as the most successful in the current Five Year Plan, Goal 1 - Technology and Goal 2 - Resource Sharing, providing additional validity to this assessment by stakeholders that these were areas of strength and success for Wisconsin in addressing areas of national focus by IMLS. The lowest rated focal area was Human Services which was tied to Goal 5 - Inclusive Services. Goal 5 was evaluated as partly achieved at the time of this report, which aligned with the self-assessment rating by library stakeholders as a place for continued growth.

IMLS’ Measuring Success Focal Areas Achievement | Scale: Not Achieved (1) to Achieved (3)



A-3: Did any of the following groups represent a substantial focus for your Five-Year Plan activities? For purposes of this question, a “substantial focus” would represent at least 10% of the total amount of resources committed by the overall plan across multiple years. For those groups who meet the criteria, discuss to what extent each group was reached. If there are important groups that did not meet the 10% threshold or do not appear in the list above, please consider discussing those as well.

While Wisconsin’s Five Year Plan reached various populations through targeted activities, no groups met the substantial focus criteria as defined by IMLS. The majority of the spending in the current Five Year Plan went towards overarching activities for the state through a focus on infrastructure and resource sharing, which were activities that reached populations broadly and holistically. Goal 5 did include the most targeted activities; however, overall spending for this goal

remained below the 10% threshold at 8% of FFY 2018-2020 spending. Youth were the most targeted group for this spending.

LSTA Reporting: Process Questions

B-1: How have you used any data from the State Program Report (SPR) and elsewhere to guide the activities included in the Five-Year Plan?

Through interviews with DPI staff, it was reported that the data from the SPR was most useful in tracking and managing different activities and related budgetary spends and match funds for projects. However, outside of using this system for reporting, SPR data is not being used to guide Five Year Plan activities in Wisconsin as part of any regular and/or intentional planning or assessment efforts.

B-2: Specify any modifications you made to the Five Year Plan. What was the reason for the change?

Interviews and focus groups with DPI personnel pointed to a collective effort to create a Five Year Plan that was focused but flexible and would allow it to remain timely over the five year period. No formal modifications were made to the original 2018-2022 Five Year Plan submitted to IMLS. Annually, DPI staff took the opportunity to consider any modifications to the plan and determined that the plan remained reflective of the work the organization has been engaged in while implementing the various programs and activities associated with their Five Year Plan without the need for any changes. The fact that no modifications were needed in the midst of the COVID-19 health pandemic pointed to the strong nature of the plan and the flexibility of the goals in remaining relevant during a challenging, unexpected event.

B-3: How and with whom have you shared data from the SPR and from other evaluation resources? How have you used the last Five Year Evaluation to inform data collected for the new Five-Year Evaluation? How have you used this information throughout this five-year cycle?

Data from the SPR and other evaluation resources have not been shared with anyone beyond DPI staff and the evaluator. It is of note that DPI has undergone significant staffing transitions and, minus two staff members, no one involved in the 2013-2017 LSTA process is actively involved in the current process. In addition to these transitions, COVID-19-related closures and staffing capacity issues on the Library Services Team at DPI contributed to challenges in utilizing the previous Five Year Plan evaluation as part of consistent, structured data collection with the current Five Year Plan.

In terms of ongoing evaluation of the 2018-2022 Five Year Plan, the current plan had an assessment and evaluation plan built into the process, limited solely to the use of the LSTA

Advisory Committee in managing both a long-range plan and in resolving any policy matters related to LSTA administration. The LSTA Advisory Committee met and was involved in these matters in a limited capacity. As of the commencement of this evaluation, the LSTA Advisory Committee had been disbanded and DPI was working on developing a new structure for soliciting feedback and sharing information and data with stakeholders. This also contributed to the lack of assessment used in both implementing and evaluating the current Five Year Plan as part of the LSTA administration process.

Methodology

C-1: Identify how you implemented an independent Five Year Evaluation using the criteria described in the section of this guidance document called Selection of an Independent Evaluator.

DPI solicited an independent, third-party evaluator through a bid process, based on the guidelines created by IMLS for the Five Year Plan evaluation. Three firms submitted proposals for review by an internal committee and the evaluator was selected based on the strength of the proposal in conjunction with cost considerations for the project. Based on this process, WiLS was selected as the vendor for the evaluation of the current LSTA Five Year Plan for Wisconsin. WiLS is a non-profit member services organization working with libraries across the state of Wisconsin and is not affiliated with the state entity in Wisconsin.

C-2: Describe the types of statistical and qualitative methods used in conducting the Five Year Evaluation. Assess their validity and reliability.

The evaluator utilized a mixed-methods research design to complete the evaluation. The information analyzed for this process included: 1) SPR data, 2) Budgetary information provided by DPI, 3) Other internal documents, statistics, and data related to the Five Year Plan provided by DPI, 4) Census data, 5) Focus group data, 6) Interview data, and 7) survey data. All data was analyzed using the appropriate statistical methodologies to ensure validity and reliability. All data was cleaned prior to analysis. Quantitative data was analyzed using various statistical tests (primarily descriptive statistics as well as bivariate and multivariate analysis where appropriate), while qualitative data was analyzed through transcription, coding, and theming. Associate instruments used in the evaluation process can be found in the Appendices B-D.

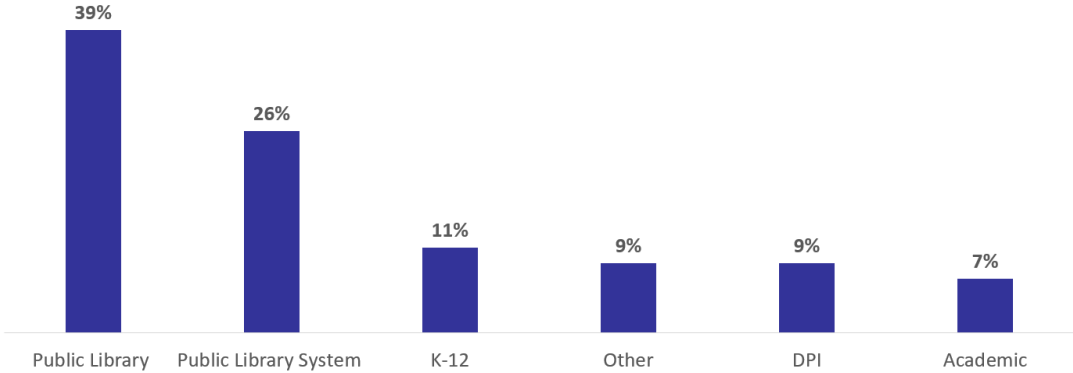
C-3: Describe the stakeholders involved in the various stages of the Five Year Evaluation. How did you engage them?

In partnership with various DPI staff, the evaluator was able to develop a robust evaluation plan that included representation of diverse stakeholders at each stage of the process. In total, over 350 unique individuals from a wide variety of roles participated in the evaluation process. Stakeholders included:

- The development of a Core Planning Team composed of DPI staff who assisted the evaluator in identifying information, data, and stakeholders for the evaluation process (n=4)
- A Full LSTA Planning Team composed of DPI staff who provided review and feedback each phase of the data collection phase (n=15)
- Public Library Staff and Directors (including tribal library representation)
- Public Library System Staff and Directors
- K-12 School Librarians and Media Specialists
- Academic Librarians
- Other partners, including representation from correctional institutions, workforce development, the deaf and blind community

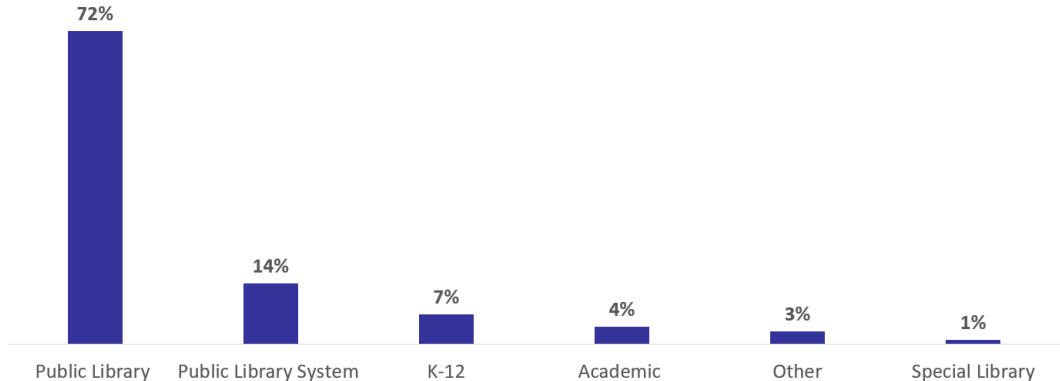
In total six different focus groups were conducted with a total of 57 participants. The participant composition can be viewed in the chart below. Focus group protocols are included in Appendices B and C.

Focus Group Composition



An electronic survey was disseminated widely to a variety of stakeholders throughout the state. The survey was open for a two-week period and included responses from 287 unique individuals. The composition of survey respondents can be viewed in the chart below.

Survey Respondent Composition



C-4: Discuss how you will share the key findings and recommendations with others.

Findings from this report will be disseminated widely. DPI will, first, share internally with administration and staff, as well as a presentation being hosted in November 2021. The findings from this evaluation report will be utilized in late 2021 to begin the process of crafting a new Five Year Plan. The evaluation report will also be shared with the broader library community, including publication on the DPI website, as well as on the IMLS website.

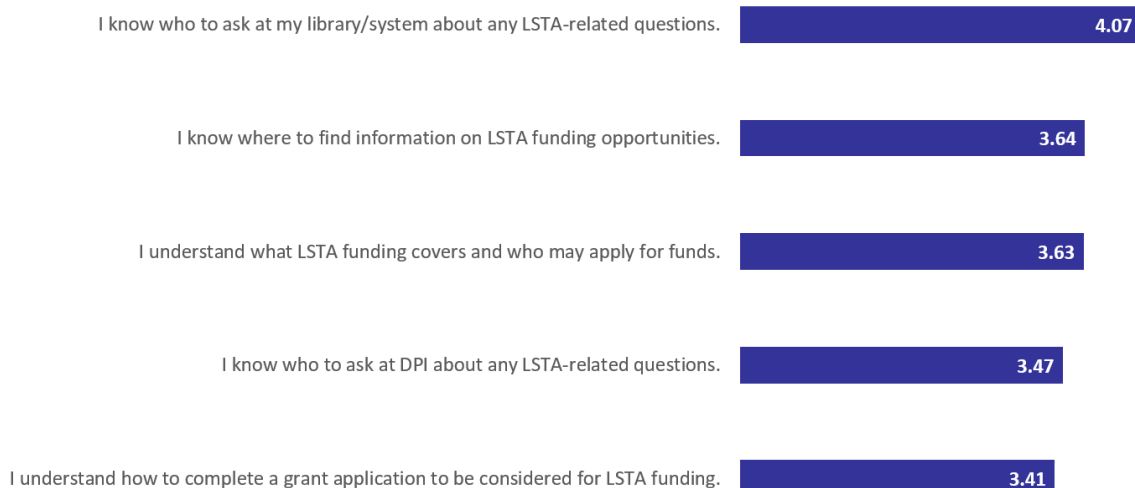
Public Library System Redesign (PLSR) Project

Under Goal 2 of the current Five Year Plan was a project titled, "Public Library System Resign." Based, in part, on reports from the Council on Library and Network Development (COLAND) and the System and Resource Library Administrators Associations of Wisconsin (SRLAAW), DPI embarked on a multi-year process to "[consider new models for how services are provided by public library systems to their member libraries](#)" with an overarching goal of ensuring that all public libraries had appropriate 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." While standalone spending on PLSR was minimal in FFY 2018-2020, many activities were mapped back to PLSR initiatives, which led to this project becoming a thread across multiple goals' activities in the current Five Year Plan. In fact, every goal except Goal 4 had at least one associated activity flagged as being part of PLSR implementation.

LSTA Grants Administration Process

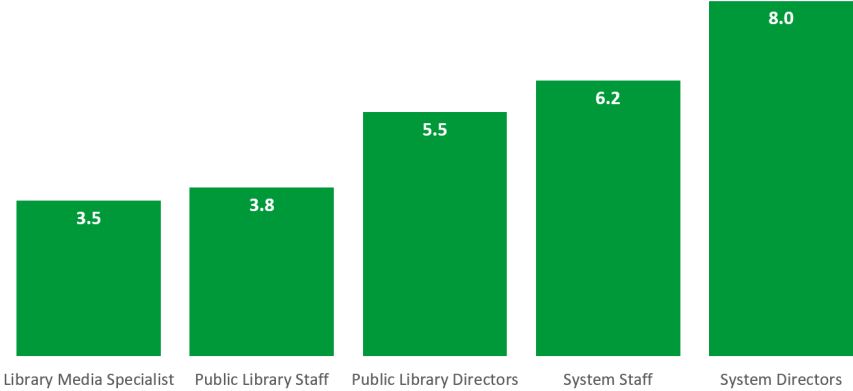
In addition to the required IMLS questions, other items were assessed as part of the evaluation process, including consideration of the LSTA grants administration process in Wisconsin. Speaking broadly, library staff working in a variety of contexts indicated agreement with all the grants administration questions.

Grants Administration Survey Questions | Scale: Greater than 3.0 = Agreement



Survey responses were broken out by role and entity to assess any differences between groups - specifically between staff and directors at public libraries versus library systems. While all groups' answers indicated agreement, individuals working at public library systems reported a higher level of agreement on the LSTA Grants Administration Process statements than those working at individual public libraries. This aligned with the finding that library workers employed at the system level - most especially system directors - indicated the most familiarity with LSTA, as well.

Self-Reported Familiarity with LSTA | Scale: 0 (No familiarity) to 10 (Very familiar)



Appendices

Appendix A: Five Year Plan Goals Mapped to IMLS Focal Areas and Intents

State Goal	IMLS Focal Area(s)	Project, Service, and Staff	IMLS Intent
<i>Goal 1: Technology</i>	Lifelong Learning, Information Access, Institutional Capacity	Statewide Technology Consulting Services	Improve library operations
		Statewide Coding Initiative in Public Libraries	Improve users' general knowledge and skills
		Increase Capacity for Technology Tools and Resources	Improve users' ability to obtain information resources
		CCBC Database Development	Improve users' ability to discover information
		Tech Days CE Program	Improve library workforce
		WPLC Biblioboard	Improve users' general knowledge and skills
		WI Schools Digital Library Consortium	Improve users' ability to obtain information resources
		Automate Southwest Wisconsin Copy Cataloging (Pilot)	Improve library operations
		Cybersecurity	Improve the library workforce
		Connectivity Grants	Improve library operations
		Infrastructure Support for Backup and Digitization Archives Storage	Improve library operations
<i>Goal 2: Resource Sharing</i>	Information Access, Institutional Capacity	WISCAT Platform and Staff	Improve users' ability to obtain information resources
		Interlibrary Loan (ILL) Staff	Improve library operations
		Funding Support for Statewide Delivery Service	Improve users' ability to obtain information resources
		BadgerLink Authentication, Federated Searching, and Staff	Improve users' ability to discover information
		Public Library System Redesign (PLSR)	Improve library operations
		Wisconsin Depository Program/Digital Archive and Staff	Improve users' ability to obtain information resources
		Support Local Costs of Digitization Efforts	Improve users' ability to obtain information resources
		Support of Recollection Wisconsin and Digital Public Library of America (DPLA) Services	Improve users' ability to obtain information resources
		Statewide ILL Meeting	Improve users' ability to obtain and/or use information resources.

		WPLC Digital Library Pandemic Support	Improve users' ability to obtain and/or use information resources.
		WSDL Digital Library Pandemic Support	Improve users' ability to obtain and/or use information resources.
		Archive of Wisconsin Newspapers Metadata	Improve users' ability to obtain and/or use information resources.
		Standalone ILS to Shared System ILS Grants	Improve library operations
		Beanstack for School Libraries	Improve users' ability to obtain and/or use information resources.
<i>Goal 3: Leadership Capacity</i>	Institutional Capacity	Annual Training Orientation for New Library Directors	Improve the library workforce
		Director of Public Library Development Team	Improve the library workforce
		Library Leadership Development	Improve the library workforce
		Trustee Training	Improve library operations
		Public Library Data and Finance Consultant	Improve the library workforce
		Public Library Standards Interface	Improve library operations
		School Library Work Group	Improve the library workforce
		School Librarian Leadership Training	Improve the library workforce
		Wild Wisconsin Winter WebConference	Improve the library workforce
		ARSL Conference Scholarships	Improve the library workforce
		PL System State Aid Funding Formula Study	Improve library operations
		Public Library System Merger Guide	Improve library operations
		Professional Learning Scholarships Pilot	Improve the library workforce
		<i>Goal 4: Community Engagement</i>	Institutional Capacity, Civic Engagement
Community Outreach Training	Improve users' ability to participate in their community		
Community Engagement Statewide Training	Improve users' ability to participate in their community		
Project Outcome	Improve the library workforce		
Outcome Measurement Grants and Support	Improve library operationsAdult and Community Services Consultant		
Community Engagement Needs Assessment	Improve users' ability to participate in their community		

		Communities Demographic Research Study ("Leveraging Library Data")	Improve the library workforce
		Harwood Innovator Lab	Improve users' ability to participate in their community
		Professional Development Research Study ("Barriers to Participation")	Improve the library workforce
		WebJunction	Improve the library workforce
		Continuing Education on Serving Older Adults	Improve library operations
		Wisconsin Libraries Transforming Communities (WLTC) Data Project	Improve users' ability to participate in their community
		Lead the Way Summit	Improve users' ability to participate in their community
<i>Goal 5: Inclusive Services</i>	Institutional Capacity, Civic Engagement, Human Services	Youth and Inclusive Services Consultant	Improve the library workforce
		Summer Library Program	Improve users' ability to apply information that furthers their parenting and family skills
		Youth Services Development Institute	Improve the library workforce
		Inclusive Services Training	Improve the library workforce
		Youth and Inclusive Services Grants and Support	Improve users' ability to participate in their community
		State and System Services Meeting	Improve users' ability to participate in their community
		Connect and Create: Students as Community Members	Improve users' ability to participate in their community
		Virtual Reading Program Platform	Improve users' ability to apply information that furthers their parenting and family skills
		School and Library Collaboration Subawards	Improve users' ability to participate in their community
		Librarian's Guide to Homelessness Training	Improve the library workforce
		Compassion Resilience Training	Improve the library workforce
		"Books in Print" for Wisconsin Correctional Facilities	Improve users' ability to discover information

Appendix B: Focus Group Protocol Questions - General Focus Groups

Evaluation Questions

1. On screen, and in the materials we had shared, are the current LSTA goals. Think back over the past few years and share how well the state LSTA goals aligned with your organization's and patron's needs?

Another way to think about this is: How did these goals align with your library or organization's strategic plan or goals?

2. You were also sent a list of LSTA grant programs/projects. Which were most effective? Which were the least effective?
3. For those of you that received funding through LSTA during this funding cycle (which began in 2018), can you share what worked and what didn't work in the grant process?
4. Even if you didn't directly receive funding from LSTA or utilize a LSTA project directly, what do you think are the benefits of the grants for your organization or other organizations that you are familiar with?
5. For those of you at a public library or system, if you have not applied for a grant, what stopped you from applying for a grant? Any barriers?
6. Do you have any other feedback or ideas for improvement on the LSTA grants or process?

Forward Facing/Aspirational Questions

1. Where do you think library programs/services/collections/technologies should/will be in the next 5 years?
2. What community needs do you think libraries should have a role in addressing?
 - a. What assets do they currently have to address these needs, if any?
 - b. What issues facing your community do you think are beyond the scope of public libraries to address?
3. How do you see the public library and the library profession changing in the five years? What do they need to be prepared for those changes?

New Five Year Plan Questions

1. Which goals/programs in the current plan should be continued?
2. Thinking about all that we discussed, what new goals/programs should be considered for inclusion in the new plan?

Appendix C: Focus Group Protocol Questions - DPI Staff Focus Group

Evaluation Questions

1. To what extent did your Five-Year Plan activities make progress towards each goal?
 - a. Where progress was not achieved as anticipated, discuss what factors (e.g., staffing, budget, over-ambitious goals, partners) contributed?
2. Thinking to the programs and activities you are familiar with, to what extent did your Five-Year Plan activities achieve results that address national priorities associated with the Measuring Success focal areas and their corresponding intents?
3. While budgetary information is ultimately used to determine what groups represented a “substantial focus” for the Five Year Plan, to what extent do you believe your current Five Year Plan targeted any of the following groups? (Share list of IMLS groups on slide for review.)
4. What have you heard from stakeholders about LSTA grant processes?
 - a. What are areas of the process you view as strengths (e.g. working effectively for various stakeholders involved)?
 - b. What about challenges and areas for improvement?

Forward Facing/Aspirational Questions

1. What community needs do you think libraries should have a role in addressing?
 - a. What assets do they currently have to address these needs, if any?
2. What community issues do you think are beyond the scope of public libraries to address?
3. How would you know if a library has successfully helped its community or met the needs of the public? What are the bigger impacts that would occur telling you a difference was made?
4. Who has not been included or involved enough in LSTA planning, allocation, and/or assessment? How might DPI involve them in the future?
5. What values or principles do you think should guide the State of Wisconsin in determining where the LSTA funds are used? Think about the current goals and projects. How well did the goals align with these principles?

New Five Year Plan Questions

1. Thinking about all that we discussed, which goals/programs in the current plan should be continued?
2. Thinking about all that we discussed, what new goals/programs should be considered in the new plan?

Is there anything else you would like to share?

Appendix D: Survey Instrument

LSTA Five Year Plan Survey

This survey is designed to collect feedback from individuals throughout the Wisconsin library landscape who have been involved in and/or impacted by the Library Services and Technology Act (LSTA) as a funding entity. LSTA funds are distributed by the [Institute for Museum and Library Services](#) (IMLS) to US states and territories. In Wisconsin, LSTA funds are managed by the [Wisconsin Department of Public Instruction](#) (DPI) and distributions are guided through the development of an IMLS-required [Five Year Plan](#). As part of the Five Year Plan process, each Plan must be independently evaluated. The current Five Year Plan covers 2018-2022 and is currently under evaluation in anticipation of the development of the next Five Year Plan.

Your Role and Organization

- What title best describes your current role?
 - Library Staff
 - Library Director
 - Library System Staff
 - Library System Director
 - Library Media Specialist
 - Other
- What type of organization or entity do you work at/represent?
 - Public Library
 - Academic Library
 - Special Library
 - School Library
 - Public Library System
 - Other
- What county does your organization primarily serve (if you have multiple branches or campuses choose the location you primarily work at)?
- How long have you worked in your current role at your current organization?
 - <1 year
 - 1 year
 - 2 years
 - 3 years
 - 4 years
 - 5-9 years
 - 10+ years
- In total, how many years have you worked in a library related position?
 - <1 year
 - 1 year
 - 2 years
 - 3 years
 - 4 years
 - 5-9 years
 - 10+ years
- My organization serves the following (municipal) population size:
 - <1,000
 - 1,000-2,999
 - 3,000-4,999
 - 5,000-9,999

- 10,000-19,999
- 20,000-29,999
- 30,000-39,999
- 40,000-49,999
- 50,000-99,999
- 100,000 and above
- Not Applicable/Don't Know
- Would you classify your organization as serving primarily a community that is:
 - Urban
 - Suburban
 - Town
 - Rural
 - Not Applicable/Don't Know
- How familiar are you with the Library Services and Technology Act (LSTA)?
 - Not Familiar At All (0) <-----> Extremely Familiar (100)
- Have you applied for and/or received an LSTA-funded grant on behalf of your organization?
 - Yes
 - No

Current LSTA Plan Progress

The following questions ask you to rate LSTA-related goals, objectives, and activities based on your own personal perspective and experiences in the Wisconsin library community. You can review a matrix of projects, services, and staff that have been funded through the use of LSTA monies by clicking here.

Thinking holistically, to what extent have each of the LSTA goals and associated objectives been achieved in Wisconsin?

	Achieved	Partly Achieved	Not Achieved	NA/Unsure
<i>Goal 1</i>	○	○	○	○
<i>Objective 1.1</i>	○	○	○	○
<i>Goal 2</i>	○	○	○	○
<i>Objective 2.1</i>	○	○	○	○
<i>Objective 2.2</i>	○	○	○	○
<i>Goal 3</i>	○	○	○	○
<i>Objective 3.1</i>	○	○	○	○
<i>Objective 3.2</i>	○	○	○	○
<i>Goal 4</i>	○	○	○	○
<i>Objective 4.1</i>	○	○	○	○
<i>Objective 4.2</i>	○	○	○	○

Goal 5	o	o	o	o
Objective 5.1	o	o	o	o

LSTA funds a variety of projects, services, and staff positions in Wisconsin. Each of these endeavors is tied to six national focal areas and associated intents identified by IMLS. Think broadly and holistically to the many different programs and services offered. To what extent have the following intents been achieved in Wisconsin since 2018 through these LSTA-funded endeavors?

The Six IMLS Focal Areas are:

1. Lifelong Learning
2. Information Access
3. Institutional Capacity.
4. Economic and Employment Development
5. Human Services
6. Civic Engagement

	Achieved	Partly Achieved	Not Achieved	NA/Unsure
<i>Lifelong Learning Intent 1</i>	o	o	o	o
<i>Lifelong Learning Intent 2</i>	o	o	o	o
<i>Information Access Intent 1</i>	o	o	o	o
<i>Information Access Intent 2</i>	o	o	o	o
<i>Institutional Capacity Intent 1</i>	o	o	o	o
<i>Institutional Capacity Intent 2</i>	o	o	o	o
<i>Institutional Capacity Intent 3</i>	o	o	o	o
<i>Economic and Employment Development Intent 1</i>	o	o	o	o
<i>Economic and Employment Development Intent 2</i>	o	o	o	o

<i>Human Services Intent 1</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<i>Human Services Intent 2</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<i>Human Services Intent 3</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<i>Civic Engagement Intent 1</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<i>Civic Engagement Intent 2</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

LSTA Process

This section of the survey covers questions related to the LSTA grants process and the information and support you have received about the program.

Please rate your level of agreement with each statement below:

	Strongly Agree	Somewhat Agree	Neutral	Somewhat Disagree	Strongly Disagree	NA
<i>I understand, generally, what LSTA funding covers and who may apply for these funds.</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<i>I know where to find information on LSTA funding opportunities.</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<i>I understand how to complete a grant application to be considered for LSTA funding.</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<i>I know who to ask at DPI about any LSTA-related questions I might have.</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<i>I know who to ask at my library/library system about any LSTA-related questions I might have.</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

- I hear about LSTA-funded opportunities through the following places:

- Email
- Listservs
- Newsletters
- My library system
- DPI contact
- Wisconsin Libraries for Everyone blog
- Youth Services Shout-out Blog
- Google Currents
- Library Services for Adults Microsoft Teams channel
- Website posting
- Public notice
- Other

LSTA Future-Facing Questions

The following questions ask you to consider priorities for the next LSTA Five Year Plan which will cover 2023-2027 and will be in development beginning this fall.

Thinking to the next Five Year Plan (2023-2027), to what extent should the following IMLS Focal Areas be prioritized?

	Definitely Should be Prioritized	Maybe Should be Prioritized	Should Definitely NOT be Prioritized
<i>Lifelong Learning</i>	○	○	○
<i>Information Access</i>	○	○	○
<i>Institutional Capacity</i>	○	○	○
<i>Economic and Employment Development</i>	○	○	○
<i>Human Services</i>	○	○	○
<i>Civic Engagement</i>	○	○	○

Thinking to the next Five Year Plan (2023-2027), to what extent should the following groups represent a substantial focus for Wisconsin? IMLS considers a group to be a “substantial focus” when at least 10% of the LSTA funding is targeting that particular group.

	Definitely Should be Prioritized	Maybe Should be Prioritized	Should Definitely NOT be Prioritized
<i>Library Workforce</i>	○	○	○
<i>Individual living below the poverty line</i>	○	○	○
<i>Individuals that are</i>	○	○	○

<i>unemployed/underemployed</i>			
<i>Ethnic/minority populations</i>	o	o	o
<i>Immigrants/refugees</i>	o	o	o
<i>Individuals with disabilities</i>	o	o	o
<i>Individuals with functional literacy or information skills</i>	o	o	o
<i>Families</i>	o	o	o
<i>Children (aged 0-5)</i>	o	o	o
<i>School-aged youth (6-17)</i>	o	o	o