Developing a statewide school ebook consortium in Wisconsin: a proposed structure

Background

In early 2015, WiLS completed a report about the school ebook landscape in Wisconsin. The study outlined some elements that would be required for a multi-district or statewide project:

- Participation in decision-making process by those funding the project
- Provision of a diverse collection of materials
- Supplementation of the shared collection with materials for individual districts
- A clear collection policy
- Clear and efficient process for selection
- Flexibility in acquisition models
- A single interface for accessing ebook and print materials
- A clear understanding of the technology environment of the participants
- A well-developed plan and support for training and education
- Regular evaluation of the project and collection
- A sustainable funding model
- Project management

Based on this work, WiLS convened a one day "Think Tank" to gather information about many of these elements in order to create the structure needed for a school ebook consortium.

The Think Tank participants were:

- Lori Ames, Middleton Cross Plains School District
- Nancy Anderson, DPI
- Martha Berninger, DPI
- Peg Billings, Tomahawk School District (could not attend in person; submitted feedback virtually)
- Sara Gold, WiLS
- Jesse Harness, CESA Statewide Network
- Cynthia Holt, CESA Purchasing
- Vicki Lyons, School District of La Crosse
- Christine O'Regan, Kenosha Unified School District
- Jen Peterson, Menasha Joint School District
- Bruce Smith, WiLS
- Mary Jo Ziegler, CESA 2

The participants received background information prior to the discussion, including:

- The report from the 2015 survey.
- Information about the Wisconsin Public Library Consortium, which provides ebooks for the public libraries in the state.
- Information about school ebook projects in other states.

All of these materials are available on the WiLS website: http://www.wils.org/wemta-ebook-think-tank-survey/

From information gathered at the Think Tank, background from other states, and the Wisconsin Public Library Consortium experience, WiLS prepared a proposal for how a school ebook consortium could be structured and how it would function.   School media specialists and others that would be interested in such a consortium were then surveyed to determine how the proposed structure aligned with their perceptions of the project. The proposal has been modified based on this feedback, and information about the survey results are included throughout the proposal.

The goal is to have the consortium and collection operational by the 2017/18 school year. To that end, the structure and costs for the first year will be firmed up by the end of December 2016.

Overall principles

While most of the discussion of the Think Tank focused on specific areas such as collection and governance, there were a couple of points that informed the overall discussion and shaped multiple areas of discussion:

It will be critical for the consortium to accommodate diverse needs of districts and differing abilities to invest in ebooks. Each school district in Wisconsin is unique, and it will be important for the consortium to recognize these differences, whether in size of student population, levels of funding, technology needs, or differences in rural or urban location.

Home access to broadband and devices will impact the ability of all students to use this collection to its fullest. Without adequate home access to broadband and devices, some students will not be able to fully utilize the materials in this collection. While we work toward developing a robust and valuable collection that will provide an equal base of content for all students in the state, we also need to continue to advocate for better access so that all students will be able to utilize this collection equally.

The primary point of discovery for this content will be through the library catalog.
Because media specialists have the opportunity to interact with students and to encourage use of specific tools, they can guide students to discover ebooks through their library catalogs rather than directly through vendor platforms. Creating a single point of discovery through the catalog will provide greater flexibility in purchasing content, as more vendors could be used without adding more places students will need to look for ebooks.

The Collection, Selection, and Platform

The Think Tank participants recommended specific elements to be included in the collection and the elements were presented in the feedback survey. Respondents were asked how strongly they agreed with each element being included in the collection.

Below is the list of most popular elements, in order by strength of agreement with the statement. The rating average is included after the statement. The scale is from -2 (strongly disagree) to 2 (strongly agree). Those statements with ratings closer to 2 are those that the respondents agreed with most strongly:

- The collection should include non-fiction. (1.73)
- The collection should include titles for pleasure reading including popular authors and award winners. (1.65)
- The collection should include materials for use in the classroom as well as traditional library materials. (1.35)
- The collection should include Spanish materials. (1.34)
- The collection should place the most emphasis on new and current materials. (1.32)

The statements below were not rated as highly as the elements above:

- I would want to choose a subset of titles for my students to access (1.02)
- The collection should include open ebooks (books out of copyright or locally created, for example). (0.97)
- The collection should include adult-level materials in addition to materials appropriate for a K12 audience. (0.59)

	Strongly disagree	Disagree	Agree	Strongly agree	N/A	Rating Average	Response Count
The collection should include non-fiction.	0	1	34	102	1	1.73	138
The collection should include titles for pleasure reading (popular authors, award winners, etc.).	1	4	32	100	1	1.65	138
The collection should include materials for use in the classroom as well as traditional library materials.	2	11	48	75	2	1.35	138
The collection should include Spanish materials.	0	5	73	55	6	1.34	139
The collection should place the most emphasis on new and current materials.	0	10	65	64	1	1.32	140
I would want to choose a subset of titles for my students to access.	2	20	54	48	15	1.02	139
The collection should include open ebooks (books out of copyright or locally created, for example).	3	18	70	41	5	0.97	137
The collection should include adult-level materials.	7	28	75	23	5	0.59	138

50% of survey respondents indicated they would prefer three distinct collections: one for elementary, one for middle, and one for high school. Another 32% indicated that they would want two collections: one for primary and one for middle/high school. Only 12% indicated they would like all titles to be in one collection.

Ideally, the content will be available with unlimited, simultaneous use. Although this may not be feasible for all titles, it is noted that the survey received numerous comments in support of simultaneous use titles. If that is not feasible, purchasing many copies of titles for classroom use will be necessary.

In addition to the elements above, the think tank proposed the following elements be incorporated into the collection to ensure a well-represented and balanced collection.   In the interest of survey length, these were not included in the survey, as they were likely to be part of the collection regardless of survey response or were not intended to be part of the opening day collection:

• Culturally diverse materials

• High interest/low reading level content

• Content from a variety of publishers

• Languages other than Spanish, especially Hmong (not intended for opening day collection)

A Selection Committee consisting of library media specialists, teachers, and curriculum experts will select materials for the consortium. All participants in the consortium will be able to provide feedback and make recommendations to the committee. There was no indication from the survey results that the community would want a different structure for the selection committee.

Platform
Similar to the collection, the Think Tank participants recommended specific elements to be included for the platform and the elements were presented to the K12 community for feedback via a survey. Respondents were asked how strongly they agreed with each element being included in the collection.

Below is the list of the elements, in order by strength of agreement with the statement. The rating average is included after the statement. The scale is from -2 (strongly disagree) to 2 (strongly agree). Those statements with ratings closer to 2 are those that the respondents agreed with most strongly:

• The platform must be operating system and device agnostic. (1.71)
• There must be apps available or any device. (1.65)
• The platform must have authentication that works with my school's existing authentication solution. (1.56)
• The platform must allow for both downloading and streaming of content. (1.53)
• The platform must have accessibility features. (1.53)

The elements below were not rated as highly as the elements listed above and may not be ""required" features from the perspective of the community:

• The platform must allow schools to add their own locally created content that is available only to their own school or district. (0.59)

- The platform must allow the consortium (not individual schools) to customize their circulation periods. (0.49)
- The platform must allow schools to add their own locally created content that is available to the whole consortium. (-0.11)

	Strongly disagree	Disagree	Agree	Strongly agree	N/A	Rating Average	Response Count
The platform must be operating system and device agnostic.	1	1	31	96	3	1.71	132
There must be apps available for any device.	1	3	33	95	1	1.65	133
The platform must have authentication that works with my school's existing authentication solution.	1	6	34	85	6	1.56	132
The platform must allow for both downloading and streaming of content.	1	4	45	80	3	1.53	133
The platform must have accessibility features.	1	1	54	75	1	1.53	132
The platform must allow schools to add their own locally created content that is available only to their own school or district.	4	30	63	23	12	0.59	132
The platform must allow the consortium (not individual schools) to customize their circulation periods.	8	28	64	19	10	0.49	129
The platform must allow schools to add their own locally created content that is available to the whole consortium.	11	53	46	8	13	-0.11	131

In addition to the elements above, the think tank proposed the following elements be incorporated into the platform. In the interest of survey length, these were not included in the survey, as they were likely to be part of the platform regardless of survey response or were not considered a requirement:

- Have circulation periods that can be customized by the consortium.
- Have MARC records and/or APIs to allow discovery through the school library catalogs.
- Having the ability for students to add their own notes and personalization is highly desirable, but not required. (not considered a requirement)

It is possible that there may be multiple vendors used to develop the collection.

Training & Support

Most support to students will be provided locally.   Training and on-demand modules to learn more about the platform and collection will be developed for consortium-wide use. There will be opportunities for local support providers to share their expertise and get questions answered through community-based support channels. The project manager will be the first point of contact for access to vendors including technical support.

Funding

Based on the survey responses, it seems that Common School Funds is perceived to be the only source of funding that will be available for this project from the districts. Both statements related to other district funding had a negative response, indicating strong disagreement with the statements:

	Strongly disagree	Disagree	Agree	Strongly agree	N/A	Rating Average	Response Count
I would support the use of grant and foundation funding for this project.	2	2	61	57	1	1.39	123
I would support the use of state funds for this project.	1	10	71	38	2	1.13	122
Dividing the costs of the project among participating districts by student enrollment is appropriate.	2	10	74	32	4	1.05	122
At least some of the funding for this project should come from Common School Funds.	6	17	69	24	8	0.76	124
At least some of the funding for this project should come from district curriculum funds.	15	46	41	9	12	-0.15	123
My district would have funds OTHER THAN Common School Funds for this project, assuming my district would want to participate.	34	48	26	2	14	-0.78	124
					answered question		124
					skipped question		16

Grant, foundation, and state funding are the most supported sources of funds for this project.

The percentage of Common School Fund that most respondents are willing to spend on a shared collection was only 1-10% (66%). An additional 23% would contribute 11-20%. Only 3 respondents indicated that they would be willing to invest 21% or more.

Until grant or statewide funding can be secured, a formula will be developed to fund the consortium through district funds. The feedback suggests that a formula based on student population would be supported in the community.

Governance

The consortium will be governed by a Board that will consist of one to two school district representatives from each participating CESA area (depending on the number of districts from the CESA area that are participating), and will be selected by the districts participating from that CESA area. Representatives may be library media specialists, curriculum experts, or others with working knowledge that is desirable for the consortium. Ideally, representatives will come from a mix of rural, urban, and suburban districts. Additional individuals may be appointed by the Board if there are perceived gaps in representation or knowledge.

The Board will also include one ex officio member from each of the following organizations that are providing services to the consortium: CESA Purchasing, CESA Statewide Network (CSN), DPI, and WiLS.

A Selection Committee, a subcommittee of the Board, will be responsible for the selection of materials for the collection.

Each participating district would designate a member representative who will be eligible to be nominated for the Steering Committee and who will also be the primary contact for the project and the individual who will vote on behalf of the district.

It is essential to create a trusting environment to ensure effective governance. One of the foundations of this project will be transparent communications and means for participation.

The survey provided a wealth of information that the Board will need to consider when developing operating procedures as well as when creating the selection committee and structure for how they will work.

Project management

A consortium of this size will require project management in order to be successful. The project managers will be responsible for:

- Developing and maintaining project plans with direction from the Board and Steering Committee.
- Coordinating the governance process.
- Coordinating the selection and purchasing of materials, along with collection analysis and planning.
- Coordinating and managing consortium communications.
- Serving as the liaison with the vendor(s) for various tasks, including interface design and changes, support concerns, software upgrades, reports and statistics.
- Developing and providing training and support materials as needed.
- Writing grants and performing any other activities as determined by the Board to assist with securing funds for the project.
- Researching potential improvements to policy, governance, features, etc. and working with the governance bodies to implement improvements.
- Gathering feedback from participating districts on behalf of the Board and Steering Committee.

There was nothing in the survey results to indicate any changed in project management roles from what was originally proposed by the Think Tank.

Roles of Ex Officio Members

Each of the ex officio members of the Board will fill certain roles to support and develop the consortium and the collection:

CESA Purchasing

- Act as the fiscal agent and purchasing agent for the project.
- Negotiate and sign contracts on behalf of the project.
- Act as the organization to which the governance is tied.
- Assist with the identification and pursuit of funding sources.
- In conjunction with WiLS, develop and execute RFP/RFI processes.
- In conjunction with WiLS and with approval from other partners, develop and disseminate communications.
- In conjunction with other partners, research and implement potential improvements to policy, governance, features, etc.
- In conjunction with other partners, develop new initiatives and ideas for the project and develop project plans for consideration by the Board.

CESA Statewide Network (CSN)/CESAs

A CSN representative will sit on the board as a representative for the CESAs.   The CSN will provide the following for the project:

- Assist with the identification and pursuit of funding sources.
- Provide approval of communications and disseminate communications to members.
- In conjunction with WiLS, maintain a community of practice for member districts.
- In conjunction with other partners, research and implement potential improvements to policy, governance, features, etc.
- In conjunction with other partners, develop new initiatives and ideas for the project and develop project plans for consideration by the Board.

CESAs will provide the following for the project:

- Provide training to member districts
- Disseminate communications to members.

DPI

- Lead the effort to identify and pursue funding sources.
- Provide approval of communications and disseminate communications to members.
- In conjunction with other partners, research and implement potential improvements to policy, governance, features, etc.

- In conjunction with other partners, develop new initiatives and ideas for the project and develop project plans for consideration by the Board.

WiLS

Provide consortium management services, including:

- Coordinate governance (develop agendas, take notes, work with board leadership, etc.).
- Coordinate the selection and purchase of materials.
- Provide collection analysis and training.
- Serve as the liaison with the vendor(s) for various tasks.
- Gather feedback from participating districts on behalf of the Board.
- Develop training & ongoing support materials.
- Assist with the identification and pursuit of funding sources.
- Communicate information about the project to their members.
- In conjunction with CESA Purchasing, develop and execute RFP/RFI processes.
- In conjunction with CSN, maintain a community of practice for member districts.
- In conjunction with CSN and with approval from other partners, develop and disseminate communications.
- In conjunction with other partners, research and implement potential improvements to policy, governance, features, etc.
- In conjunction with other partners, develop new initiatives and ideas for the project and develop project plans for consideration by the Board.

Next Steps

Activities for June 2016-December 2016

1. Constitute temporary board consisting of Think Tank members and others identified by the Think Tank and the partners.
2. Collect additional input from districts as directed by the Board.
3. Develop FAQ about the project to address concerns as they are discovered.
4. Develop operational processes for the board.
5. Name the project.
6. Develop overall project budget.
7. Develop formulas for new members and ongoing members.
8. Begin procurement process for opening day collection.
9. Start communicating information about the project costs, etc.
10. Identify potential sources of funding for project.
11. Begin asking for funds for startup.

Activities for January – August 2017

1. Continue procurement process for opening day collection.
2. Select materials for opening day collection.
3. Communicate with districts about the project and how to sign up.
4. Sign up districts.