The model review conference was facilitated by Jeff and Linda Russell of Russell Consulting, Inc. The following notes were captured during the session by John Debaucher and lightly edited by Russell Consulting, Inc. to remove the names of individual contributors and ensure some uniformity in the structure of the reporting.

**Key Themes from Workgroup Reports and Focus Groups/Surveys**

Individuals within the group identified the following as major themes that emerged from their review of the data collected by the PLSR process. These themes were capture by Jeff and Linda Russell, the conference facilitators.

1. Creation of centralized services
2. Disparity of the needs between small & large libraries
3. There are perceived/real winners & losers
4. There are various reasons why inequities exist & there is no single way to solve them
5. The high satisfaction with how the systems are now
6. General “Don’t tell me what to do, just help me.”
7. Local library identity and control important, but they still need/want help
8. Larger units of service seem desirable
9. Process is going to take time to unroll/develop and get to the point where we want it to be.
10. General amount of fiscal unknowns.
11. The Hubs as “one-stop shopping to better serve needs.
12. Interconnectedness and interdependency between libraries and the models
13. Desire for interconnectedness around resources and expertise
14. Breaking down of artificial boundaries
15. The high value based on equity but equity defined in many different ways.
16. There needs to be a transition strategy articulated to whatever the end point(s) is.
17. Feedback and materials produced means any solution needs trust, choice, incentives, and flexibility baked in.
18. Accountability is imperative.
19. Read that there is fear about what happens to current system staff in these models.
20. Building upon the strengths to improve services for everyone
21. The funding formula is part of the problem.
22. Several really deep-seated concerns about how functions are going to change (e.g., the resource libraries). Also applies to how the systems are going to function (“Am I going to lose my system resource people.”)
23. Need for better data standardization & strategy – how those are collected & reported.
24. A lot of value placed on being fair & what is fair. People paying for what they use.
25. Communication: the networking of libraries, communication between libraries they serve & their people. That there is open and honest two-way communications between those talking & building relationships.
26. Focus on the patrons – what is best for them in the long-run.
27. Various sources of feedback indicate that there are a few things out there right now that have a critical mass for positive change. For example:
   a. online CE portal, validation, tracking;
   b. enhanced local technology services;
   c. delivery hubs;
   d. collaboration to improve services already
28. The boundaries are challenging, they are important, but especially counties, as they relate to funding.
29. There are some small libraries than can’t afford system services.
30. Fear of change requiring legislation.
31. Two different ways of thinking about that last issue: a) How much do we have & what does this get us; b) What do we want & how do we pay for it.
32. To what extent is inertia playing a role in this process?
33. Right now, we have the PLSR process on track. There is also the WLA legislative process unfolding, so there are two processes proceeding in parallel that will need to converge, but how? In other words: How does service/vision dovetail with legislative strategy?
34. There needs to be courage, but it needs to be pragmatic.
35. Strategy on how to pay for new services while current services continue to be provided.
36. Perception that the data is flawed, therefore, the final product is flawed.
37. Don’t throw out the baby with the bathwater; get the dirt off the potato.
Reactions to themes:

- Changes in the systems, area, and scope, all came out of different paths, not ones that people would have chosen on their own.
- Monarch merger: now different with a county(ies) that need help with technology that they expect or hope county can support. Formerly unrecognized need. Some old equipment. Monarch has tried to help, but stretched thin.
- Problem with some small libraries whose communities are unable or unwilling to support the costs for services offered by systems – those may need to be addressed too: what should a library be able to provide in order to benefit?
- This is good and complex, and complicated, and I’m glad to be in the room with others to try to solve it.

Exploring and Discussing Possible Service Models

The three service models under consideration at the Conference were individually reviewed by Model Review Teams. Each team was comprised of a diverse array of Steering Committee and CRC members and facilitated by a designated Steering Committee member. Each Review Team had approximately one hour to discuss their assigned model, dig deeper into each model following a set of questions developed by the facilitators, and develop a set of findings including identifying questions, issues, ideas for strengthening/enhancing the model, and additional information that might be helpful in making a more informed judgment about the model.

Each Model Review Team then presented their findings to the large group. What follows are some of the key issues, questions, reactions, and suggestions identified by each review team and by the large group following each model review presentation.

For detailed descriptions of each service model, see the service model description documents available separately.

Service Model X

The issues, questions, reactions and suggestions identified by the review team and then by the large group regarding this model included the following. [Note: the following summary notes from the review team were recorded by John Debaucher and are not meant to be a substitute for the model review team notes that each team recorded – available as a separate document.]

- **Strengths**: the current regional structure. Keeping the baby and most of the bathwater. Familiarity. May calm fears. Addresses accountability. Smaller groups, so maybe better voice by members. Aligns with workgroup proposals.
- **Challenges**: Doesn’t focus so much on the patron experience as on system staff
  - Radically affects SE of the state and doesn’t address greatest needs.
  - Squanders the efforts of the library community/PLSR process, three years of time we’ll never get back.
• Balancing of state funding not addressed
• Getting Milwaukee to join with two other counties could be a challenge
• Resource library role uncertain. Doesn’t offer enough opportunity for innovation.
• Doesn’t address equity. Could slip back
• Implementation: easy, except for SE WI

• **Design principals**
  • Fully satisfies transparency.
  • Partially maintains trust—not a leap for most of the state; doesn’t work for SW
  • Partially achieves efficiencies
  • Protects public library willingness to address new service models
  • Fails to allow for local needs; fails to address equity; fails to improve level of service
  • Does not ensure that libraries can provide equity of access
  • Uncertainty: doesn’t address (unclear) whether it poses negative impacts on libraries.

• **Winners/losers**: pretty much same as now except losers in SE
  • Popular with anyone anxious with process; those already fiscally stable; politicians who don’t want to change or who are out of the loop, or who say “not broke, don’t fix

• **Resource status unclear**, also doesn’t address have-nots

• **Suggested changes**:
  • Group did not support, so hard to answer
  • Rix funding formula
  • Don’t create more winners/losers
  • Shift local costs to the state—make state-funded “core” services like delivery
  • Uniform fiscal, data, accounting standards, practices
  • Some sort of solution because not all workgroups can address this model
  • Change system membership requirements, possibly stricter
  • Expand/increase/enforce library standards

• **Questions that need answers**:
  • Add county piece for funding or just use population w/o number of counties
  • Could this be “phase 1” of a larger, bigger scope process:
**Reactions from the Group:** [each represents a specific person's comments and is not necessarily reflective of the group]

- Doesn’t address innovation—would have expected that the current model couldn’t provide for innovation when they (Z) noted the same challenge. Some systems (SW) already can’t innovate, and this wouldn’t change.

- One way to simultaneously address equity issue with regional control—what if, if there is move to “modernize” current structure, could there be a way to find additional resources and have that allocated in a different way. (If there were new money, use it differently)

- The aspect of “stability” funding issue—does the model address the long-term stability of systems

- What the consensus was on the “accountability” factor. Noted that accountability, from the system level, is that the “effectiveness” statement doesn’t really work. How did this group see opportunity for that? If you think your system accountable now, that won’t change. If you aren’t happy now, you likely still will be.

- A lot of feedback is that there is so much good going on now, the surveys have high satisfaction, she thought Model X would be more positive.

- One person rated their system high, but still wishes there were more they could do.

- Lots positives on surveys but then lots of “this is wrong, this is problem…”

- System survey a few years ago were very positive because so much was not known. But a new survey were done, maybe there would be less. Maybe the most unhappy aren’t taking the survey.

- This model is the “staw-iest” of straw men, being most likely to be knocked down. Re-alignment based on number of counties is one of the less likely.

- If state threatened to make one system, or take it away, it doesn’t seem productive to then recommend not really changing anything much.

- But this isn’t a reason to make big changes, either. I’m not saying that nothing should change. There are some great ideas coming out.

- Question: if there is something that maybe should be changed in this model, what would that be? It seems that this model was more focused on the system structure not so much on the services. How could this model be tweaked or edited so that the workgroup changes can or could be achieved within this model.

- We’ve seen some areas where changes could be possible as statewide or regional models, and those could happen (delivery, ILS integration) are things that don’t have to be tethered to big change. Some twist could be put on this model to demonstrate potential for this model, even as the lowest common denominator, where change could be affected.
People may be generally satisfied, but for many, they see what is happening elsewhere and that may have opened peoples’ eyes. Important to avoid temptation to avoid risk or making changes because of fear. Commended that they noted current satisfactions. Keep eye on where we could be, though.

Service Model Y

The issues, questions, reactions and suggestions identified by the review team and then by the large group regarding this model included the following. [Note: the following summary notes from the review team were recorded by John Debaucher and are not meant to be a substitute for the model review team notes that each team recorded – available as a separate document.]

- **Note**: Model takes advantage of the Delivery Group model to divide the state into seven regional areas, along with a level of administration statewide.
- **Strengths**: uses scale to create efficiencies; possible closer relationship to state policy makers; state-level governance could have levels of representation; ensures that delivery of services to all libraries can rely and expect – mandatory services guaranteed available; Progressive model, advancing change and innovation, moving the systems forward in the state
- **Challenges**: doesn’t address local funding disparities. Cross-border borrowing stays an issue. Less local autonomy; less local service providers, relationships with individuals; transition issues would need to be addressed—unclear; how do we decide where offices are in the regions? How do we centralize services and yet be able to provide for innovation locally (though innovation relies on people, not structure); current funding formula is not dynamic—how do you slice and dice if population is weighted 85%? How is statewide layer to be funded? How to incorporate existing policy and policy bodies; sense of loss of control, status.
- **Unique contributions/approach**: compromise model; potential to satisfy local libraries along with have statewide coordination; addresses criticism that process isn’t grounded in data, however, delivery was very wrapped in data and concrete examples; dramatically reduces number of systems
- **Satisfy/doesn’t satisfy governing values**:
  - Fully satisfy: allowing for innovation & evolution; achieving efficiently, protecting public autonomy; willingness to participate, address local libraries need, and improve services; model itself is innovation, yet it doesn’t crimp ability to address innovation
  - Partially satisfied: #3 transparency in decision making—that depends and would need to be a goal; “ensures accountability for library system” – need to know more; “ensure all libraries are able to provide equitable series – but current funding model would not provide for that
  - Unclear: would it foster and maintain trust? Would it provide accountability:
  - Winners/losers? There would be more winners than losers; move in right direction. Stakeholders in rural areas would be the greatest supporters.
Resource libraries would be resistant, along with well-funded, well run systems

- **Suggested improvements**: have a transition plan on how to get there; need way to see how the new standards could be made for systems. Support for grants, help with annual reports, etc.
  - Need to look at populations in areas and how funding impacts that or would need to be addressed
  - Is there some incentive to help foster these changes?

- **Questions they have**:
  - What is the value proposition that this model brings to local libraries? How would this be compelling to local libraries? May be compelling to patrons, but model in itself doesn’t
  - State level governance – more detail needed. Flesh this out. Would be good to see funding report in dollars to see fiscal impact.
  - Paula had a scale of one to five for their group—they were at a 4 in general

- **Reactions from the Group** [each represents a specific person’s comments and is not necessarily reflective of the group]
  - Give more on how it would benefit local libraries. A: would consolidate expertise more and provide access w/o jumping through more hoops. Takes some of those state-provided core services and makes them coordinated statewide. Regional can do more interacting with their libraries.
  - Just to understand it as a model—would delivery be statewide coordinated, along with automation and tech support? ILL is regional. In ILS—is that discussed? How 40 disparate systems are addressed? No—that would still need to be addressed. Make that clearer. Clarification is that there was a half-time coordinator to foster communication between all the many ILSs
  - Model reduces number of systems, would delivery be the same as its own model provided? No—that wasn’t discussed
  - Would there would be accountability from above as well as to below (member libraries)? It was suggested that there were standards for the systems/areas

**Service Model Z**

The issues, questions, reactions and suggestions identified by the review team and then by the large group regarding this model included the following. [Note: the following summary notes from the review team were recorded by John Debaucher and are not meant to be a substitute for the model review team notes that each team recorded – available as a separate document.]
• **Strengths**: puts service provider closer to funding; clear easier path to equity; single resource; greater; field office; clear delivery

• **Challenges**: State procurement process onerous and slow; chances great of unintended consequences caused by statute changes; what about services provided by systems not in this model? How to reconcile service standards & last mile services in areas of the state (resource lite); model doesn’t address accountability at county & local levels; bringing innovation difficult; hard to steer a big shop' less redundancy and more funding vulnerability; creates more negative and propensity for zero-sum thinking; state librarian—who appoints? Need extremely effective mechanism. Needs to be carrot or a stick to get local libraries to participate

• **Unique**: management team equates ability to provide interconnectedness of services; statewide discoverability; ILS interoperability & network convergence examples of opportunists; governing board with regional; statewide ILS support? One bucket for funding

• **Governing Values**
  - Which design principle satisfied? Only one fully satisfied principle- that all libraries have equity of access to statewide services. Comment: dependent on lots of factors, especially $
  - Only partially satisfies #4, #5: doesn’t fully satisfy; #6: how to provide full-scale innovation/integration?
  - Failed to satisfy #8, respond to local libraries’ needs (either only partially or fails)
  - Unclear – This model is difficult that there are five basic principles that are unclear. Felt that this model is unclear whether it allows for innovation – leans toward partially satisfies. #3 (clarity) unclear; #7 not sure of possibility of negative impact. Potential danger in cracking open Chapter 43. #9: Does this model preserve or improve services provided by systems – unclear. Provide winners/losers: stakeholders used to change supporters. Entities okay with rolling into statewide model would support, large libraries more likely

• **Resist**: small and rural libraries because of “Madison” effect. LD&L might resist because of SRLAAW support for libraries—if SRLAAW ceased to exist, (though wouldn’t there be a body to provide that, anyway?). Also any stakeholder putting value on local control

• **Changes needed**: some mechanism to infuse advocacy into future model. Library-centric, library-led involvement.

• **Questions needing answers**: so many unknowns. Fine governance mechanics (who appoints, how chosen), also “boots on the ground” reality challenging

• **Reactions from the Group** [each represents a specific person’s comments and is not necessarily reflective of the group]
Assessing the Three Models

Following each presentation of the three service models, the facilitators asked individuals to rate the model on a 10-point effectiveness scale (1 = Very Ineffective to 10 = Very Effective) to indicate how effective the model was at satisfying the design principles and the goals of the PLSR. This assessment was intended to be a quick “pulse-taking” of individuals toward the models. To avoid giving the impression that the group had voted to decide on which model was best, the facilitators did not share the results of the assessment.

The facilitators collected the paper “votes” and will share the effectiveness scores of each model at the June 8th meeting.

Discussing the Emergence of Additional Models

The final portion of the day’s agenda involved the facilitators asking if, based upon today’s service models review, there are additional models that should be developed for and considered by the group at its June 8th meeting?

One individual asked if he could put his thoughts together and share a variation on one of the models. The facilitators suggested that if anyone wanted to offer some variation on any of the models that they should share these with John Thompson by May 30th.

Next Meeting of the Group

The next meeting of the group will be on June 8th. At that time the group will review the results from today’s meeting (including reviewing the effectiveness scores) and begin to converge on a single model or framework for supporting public libraries. The results from the June 8th meeting will then be shared with the public for comment. The focus then shifts to July 30-31st where the group will build its recommendations for a future public library services support model.