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COMMUNICATION & COUNSEL

Subject: **Canadian Library Association Conference Trustee Reports**

Prepared by: **Jim Bennett, Vice-Chair, Ottawa Public Library Board**

Prepared for: **Ottawa Public Library Board**

Meeting of: **September 10, 2012**

I attended the 2012 CLA Conference for 4 days (May 30 – June 2, 2012).

A. Weds May 30: Event 1 - CLA Advocacy Boot Camp and CLA On the HILL

One of CLA's key roles is as an advocate for libraries and library issues with the federal government.

In the morning session participants received a briefing from Impact Public Affairs on the Canadian political scene that included (a) a history of lobbying and "what works", (b) a compendium of factors influencing elected officials, (c) trends in lobbying in relation to the "elevator pitch", and (d) a briefing on key CLA issues.

In the afternoon session, more than 60 members divided into 18 teams fanned out over Parliament Hill for meetings with 63 MPs, Senators, and key Hill staff. CLA members highlighted copyright legislation, library book rate, the Community Access Program, and budget cuts affecting federal libraries and Library and Archives Canada as key issues. I met with Brad Butt, MP Conservative (riding: Mississauga-Streetsville) and John McKay, MP Liberal (riding: Scarborough-Guildwood). Reports indicate that the first "CLA on the Hill" day was a tremendous success.

B. Thurs. May 31: Event 2 - Opening Ceremonies & Keynote Speaker Daniel Caron, Librarian and Archivist of Canada - Topic: Future of Libraries in Digital World

Daniel Caron provided his understandings surrounding an answer to the thought-provoking question "Are the time-honored methods that were appropriate to an

analogue world transferable to the digital realm? His entire speech on this controversial topic can be viewed at URL -
http://www.youtube.com/watch?v=vNSlcLrg45o&feature=youtu.be

C. Thurs. May 31: Event 3 – Stephen Abram's Topic: Community Impact: Transforming Lives through Libraries

Two basic concepts developed in this session can best be expressed by in two tables.

The Evolution of Libraries
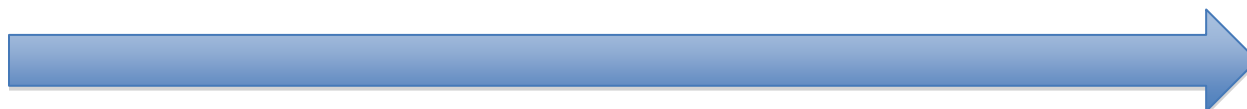
THE PAST	THE PRESENT	THE FUTURE
Building libraries and collections	Letting People Know About Them	Let the People Know What We Can Do For Them
It's All About Numbers	It's All About Marketing	It's About Outcomes

Distinguishing Outputs from Outcomes

OUTPUTS	OUTCOMES
Usage	Satisfaction
Numbers	Stories
Job Searches	Jobs Found
Facts	Feelings

D. Thurs. May 31: Event 4 – Edmonton Public Library: Making a Lasting Impression: Building our Brand in our Branches

The presentation developed around the concept that your brand is not your logo but rather it is about all the associations and perspectives your customers put on you either with your input or without it.
Ideas clarified in the Edmonton Public Library experience:

1. One must help staff (a) <u>see</u> what branches look and feel like to customers, (b) <u>understand</u> the negative impact of visual displays on perceptions and use of library, (c) <u>identify</u> the causes of a problem, (d) <u>generate</u> ideas at all levels to resolve it, and (e) <u>get</u> ownership at all levels to solve it.
2. Think about how it feels to walk into a clean, organized, easy to navigate, well-presented home, office, or retail environment. Think about library customers

walking in to your branch. Think about the physical space, the signage, the branding, the posters, and the desk. How do you think this makes them feel?

3. Clutter (a) restricts ability to focus, (b) limits brain's ability to process information, (c) wears down mental resources, and (d) causes frustration.

4. Why is it possible that an unprofessional look equals incompetent in some customers' minds? Why do some customers perceive friendly people to be smarter than unfriendly ones? Why do customers not understand role distinctions in your library?

5. Using a system approach to a system challenge may be needed in signage and way-finding, furniture and equipment, merchandising, enticement/advocacy, and staff identification.

E. Thurs. May 31: Event 5 – Markham Public Library: Stand and Deliver in Library Advocacy and Budget Defence

Markham Public Library's experience in overcoming and breaking through barriers within the municipality related to unforeseen priorities, tenuous relationships, fear of reprisals, and competition for resources was identified. Solutions involved (a) engaging in priorities of council, (b) taking part in development of city master plans, (c) making certain robust opportunities for the library system existed and were well-known, (d) building trustful relations with staff and council, (e) aligning library mission around Mayor's inaugural speech, and (f) talking in the language of council.

F. Fri. June 1: Event 6 – Satellite CLA programming at Ottawa Public Library - Local students celebrate winners of 2012 CLA Book Awards

I attended this event held in the Children's Programming Area of the Main Library where I witnessed Grade 3 students from Elgin Street Public School and Grade 7/8 students from Glashan Public School actively involved in celebrating the success of the 2012 CLA 2012 Book Awards winners (Catherine Austen, Kit Pearson, Matt Forsythe) by means of an OPL programming event that immersed students in the joy of the creation of outstanding literary works.

Congratulations to Jane Venus and her team that includes Elizabeth Thornley and Jessica Roy and other OPL staff involved,

Staging this marvelous OPL event, especially during the CLA 2012 conference, required significant planning and organization that showcased the considerable creative skills of OPL staff in enriching 21st century literacy skills of school age children and teens.

G. Fri. June 1: Event 7 – Grimbsy Public Library: Getting your Library from Good to Great

Leadership in this library system used the work by Jim Collins in his books – "Getting from Good to Great" and "Great by Choice" as a guiding philosophy. Throughout this presentation specific examples of the practical application of 10X leadership model emphasized how the library system applied this management perspective to create its own future. Some tenets of this leadership philosophy are that a leader must:

- ❖ practice fanatic discipline by (a) demonstrating extreme consistency of action, (b) acting consistently with your values, goals, performance standards, and methods, and (c) being relentless and unbending
- ❖ demonstrate empirical creativity by (a) looking to empirical evidence when faced with uncertainty (b) relying on direct engagement with tangible evidence, direct observation, and practical experimentation, and (c) making bold creative moves from a sound empirical foundation
- ❖ Adapt productive paranoia by (a) assuming that change is constant and that conditions can and will turn against you (b) channeling fear into planning and action, and (c) staying attuned to threats and changes in your environment

According to the Collins credo - Fire bullets, then cannonballs. This library system tested the waters before sinking massive funds into a product or project. They did small, test projects to determine if they were on the mark. This led to being slower to deliver to all, but they were rewarded in the end because their products/projects were finely tuned to deliver exactly what their customers wanted.

H. Fri. June 1: Event 8 – Ken Roberts, Mike Ridley, Daniel Lee: Conversations with Leaders

During this moderated conversation the panelists who were a corporate knowledge manager, a university librarian, and a public librarian, expressed the following questions or comments. Below are some examples:

1. We must adapt to accommodate the e-book while meeting the increased demand for physical resources.
2. Restructuring will occur because of inadequate funding.
3. New open access scholarly journals will begin to proliferate and the presence of e-journals will increase.
4. Libraries must link to "learning" outcomes.

5. Clients are becoming consumers and want participatory learning environments that will shift and change.
6. Role of librarian will change becoming much less transactional. Librarians will be embedded in community organizations and corporations.
7. We should refer to those who visit the library as customers not patrons for customers have the choice from where they get their services.
8. Libraries should redefine their business for no longer are they just in the information business but also libraries provide people with the opportunity to create content. "Maker" and "hacker" creation spaces (e.g., music editing rooms, performance spaces, laptop labs) will be needed to hook customers on music and technology.
9. New approaches will be used to scan, curate, and prepare innovative ways of packaging digital collections.
10. One must determine what the #1 most asked reference question that staff get in your library system. Give all staff the ability to answer that question by providing appropriate training and professional development.
11. Look "outward" for solutions.
12. Don't hesitate to "blow up" your library if necessary but sell the vision first in a consultative phase.
13. Governments will give "money" to those organizations that demonstrate value.
14. Librarians should be optimistic: Assess, adopt, and abandon. Adapt.
15. It is the "coolest time" to be a librarian for it's fun rewriting the "rules".

I. Sat. June 2: Event 9 – CLA Battle Decks

Christine Langlois, Trustee, Ottawa Public Library faced the ultimate challenge for a speaker as she and five other contestants were challenged to give a coherent presentation based on hand-selected, seemingly unrelated slides that they saw for the first time live on stage. All library board trustees and staff are proud of Christine for she emerged in 2nd place in CLA's first Battledecks.

J. Sat. June 2: Event 10 – Dysart & Jones Associates: Strategic Planning – Keep it From Failing

According to the presenters, strategic plans are about change – fundamental and significant change – to move the library from a place that is no longer relevant and sustainable to one that is vibrant, engaged, and essential to the life of your community. Some of the elements of the presentation were:

1. Be courageous, committed, selective, and a visionary in developing a strategic plan. Be a leader not a follower, stick to your strategy and measure your progress. These were the seven keys to successful strategic plan.

2. Use SWOT as an analytical tool but honestly assess key strengths and weaknesses. Focus on the future – ensure "O" and "T" are grounded in research on the future of communities and libraries. Frame the SWOT as "SoWOT" – seriously consider what this means for your library. Isolate elements of the SWOT that indicate the need for change for all else is irrelevant and distracts you from the primary purpose of the plan. The critical considerations can be counted on one hand. In most strategic plans 80% of the strengths and weaknesses are of no significance.

3. Ask yourself the following questions. Does our vision of the future of the library:
   - ✓ Have buildings that are anything like today's buildings?
   - ✓ What are librarians doing in the building?
   - ✓ Do librarians staff libraries?
   - ✓ What is staff doing?
   - ✓ What skills do staff need?
   - ✓ Who is using the library and for what purpose?
   - ✓ What services are available that are not today?
   - ✓ What can you do in the library that isn't allowed today?

4. Have the courage to embrace change. A good vision statement describes a library that, in many respects, bears no resemblance to the one that we see today and sets the "target" for the strategic plan. Challenge public opinions and perceptions and be prepared to take your community in a different direction. Make your case for change – reasoned, defensible, and practical. Then do it.

SUMMARY COMMENT

Finally, I would like to thank the Ottawa Public Library Board for presenting me with an opportunity to attend the 2012 Ottawa CLA Conference, to be involved in continuous learning, thereby helping me fulfill my role as an Ottawa Public Library Trustee.
For more details on specific events that I attended go to URL:
http://www.cla.ca/conference/2012/

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Subject: **Canadian Library Association Conference Trustee Reports**

Prepared by: **Amelita Armit, Trustee, Ottawa Public Library Board**

Prepared for: **Ottawa Public Library Board**

Meeting of: **September 10, 2012**

I was a first-timer at this conference and I found it to be a good venue for getting a pulse on library issues across the country and an excellent opportunity to meet people engaged in the library system including leaders, providers and suppliers of services to the library. Rating: Highly Recommended

I attended the following sessions:

1. Opening Plenary – Keynote Speaker, Daniel Caron, Archivist of Canada

Outlined strategic directions of LAC (e.g. open architecture for transmitting knowledge; virtual support services), and explained cuts and decentralization of certain services. The messages did not resonate well to a majority of the audience. Many decried negative impact on research and academic libraries and on documentation/preservation of Canadian history.

2. Community Impact: Transforming Lives Through Libraries

A most interesting panel on creating programs that demonstrate value to citizens by understanding the psychographics of library users, patrons, i.e. the why behind end-users' demands and developing programs and services that meet them.

3. Making a Lasting Impression: Building our brand in our Branches

A very impressive presentation on the marketing/advocacy campaign undertaken by the Edmonton Public Library. Serves as a good model for engagement of staff and the public.

4. The Great Debate

A "fun" session which highlighted the pros and cons of controversial issues facing libraries today such as the use of technology; the new role of libraries as community hubs and platforms for instilling democratic information societies, and the new role of librarians, etc.

5. Plenary Session - The International Impact of national Advocacy Efforts

This session provided insights on the extent of collaboration among member countries on responding to issues affecting libraries, e.g. intellectual property and copyright laws, and noted the importance of perseverance in navigating the complex protocols and relationships of institutions at the international level.

6. CLA Challenges Survey 2011: Update

Final Report still in preparation, examples of trends noted: more DVDs being challenged; not labelling or inappropriate labelling of restricted materials and graphic novels; not restricting borrowing by age group. Challenges were region/community specific --- example The Hunger Games was challenged in some libraries as not appropriate for circulation, but not in others.

7. Conversation with Leaders: Future Strategies

Key messages: challenge cutbacks by linking libraries to learning outcomes; reframe business model—spaces as assets vs. collections, providing creative content vs. providing information; changing relationship with clients–focus on learning environment; new role of librarians, moving away from transactions to being embedded in the process of the final product; understanding and confronting the digital revolution—bite size content; analysis of data patterns, curating vs. consuming data and repackaging it to tell a new story; broadband space -- the new railroad---library providing the connectivity.

8. CLA Battle Decks: Well done Christine---you did us proud!!!

9. iCanada and the Library Community: A Natural Fit

This should have been a plenary session. I-Canada is a national movement that calls for the next generation of broadband speed as a mechanism for connecting communities----the library is a natural fit to participate as champion for this cause, given its advocacy of the library as a community portal/ hub where all things can happen.

10. Closing Session

Award Ceremonies: Well–deserved recognition of library leaders/champions

Political Journalists' Panel on politics, Ottawa and Libraries: Sobering thoughts; also realistic thoughts---culture (including libraries) not high on government agenda---expect more fiscal constraints that will have impact on libraries.

COMMUNICATION & COUNSEL

Subject:	**Canadian Library Association Conference Trustee Reports**
Prepared by:	**Christine Langlois, Trustee, Ottawa Public Library Board**
Prepared for:	**Ottawa Public Library Board**
Meeting of:	**September 10, 2012**

The CLA conference was held in Ottawa from May 30th to June 2nd, 2012. From the presentations I attended, two ideas stood out:

1) To maintain and grow their relevance in their communities, libraries must constantly re-invent themselves. This re-invention must be led by library boards through strategic planning. This implies that boards have to take risks and articulate strong visions, offer new services and not be afraid to ask the community and decision-makers for support.

2) The second idea was that libraries have to "sell" themselves to convince the public and elected officials of their relevance. This can best be achieved through advocacy, which is understood by CLA as saying to decision-makers, potential partners, funders and any stakeholder "your agenda will be greatly assisted by what we have to offer."

These two ideas come together in this way: the role of a library board is to be innovative and creative, to give the population and elected officials new ways of seeing and using libraries. As summarized by presenter Jim Morgenstern, Partner of Dysart and Jones Associates, libraries must be leaders of public opinion and they must contribute to build and inform those opinions. Libraries cannot afford to simply follow well-established trends

Here is a summary of the noteworthy workshops I attended:

Name of workshop: *CLA Advocacy "Boot Camp"*

Presenters: Huw Williams, President, Impact Public Affairs

Cynthia Waldmeier, Impact Public Affairs

In Ottawa, politicians and journalists have a strong attachment to the idea of library. The Library of Parliament plays a role essential to them, as well as libraries in their communities. The challenge for CLA is to transform this attachment into tangible support.

The situation on the Hill is as follows: normally, in a majority situation, elected officials and staff settle into their jobs and a better collaboration is established between parties. However, a year after the last election, such collaboration is fleeting. There is distrust and even disrespect between the main parties, which makes it hard to have collaboration. Both parties are still not talking publicly or privately. There seems to be no harmony in Parliament.

For the immediate future, the economy will continue to dominate. Departments of the government will be busy studying where they can cut. This situation creates a very competitive political landscape. Politicians act according to public opinion and by what they see in the media, especially their local media. They read their riding's newspaper more than they read the *Globe and Mail*. They also tend to follow blogs and social media.

In order to influence politicians, libraries have to reach out to them in a variety of ways simultaneously. Libraries have to talk to politicians personally, through various media, and through their constituents. The worse method to approach them is through cabinet ministers only.

The approach that works best is having real people delivering the message to local leaders and politicians in an original and imaginative way. It also has to be done in a sustained and coordinated approach. Libraries have to educate decision-makers in order to frame their issues before someone else (i.e. the government) does it for them. And they need to state their position on an issue collectively as an association. Their purpose and their objectives have to be very clear. And, ideally, libraries should it approach politicians in their ridings in a visible way. As columnist Andrew Coyne said: publicity stunts are attractive to journalists because they are so easy to cover.

Here is how a message should be delivered to a MP:

- Keep your argument short: 3 arguments, 1 issue
- Tell one personal story
- Express clearly what your concern is
- Explain why an MP should support it
- Have a specific request
- Leave a concise document behind
- Send a thank you note.

During the meeting, say from the beginning that you are a constituent and provide a street address in the riding. Speak from the heart, state one core argument, and resist giving the politician a big package of information. Don't hesitate to repeat your request.

If you are sending your request, remember that 90% of messages to elected officials are sent electronically. Therefore, a letter has more chance to be noticed and remembered than an email. If you are using email, avoid attachments. When sending a letter or an email, make sure you copy your association. Make sure to also mention your riding name, your postal code and address.

Avoid using tactics that have proven unsuccessful such as adopting a confrontational style, not being prepared or being too rehearsed and artificial. However, the biggest and most common mistake is to not listen to what the MP has to say.

Meeting with an MP is more or less delivering an elevator pitch. You have 50 seconds to:

- Establish your relevance
- Explain who you are and where you are from
- Paint a mental picture
- Express your concern
- Clarify why should an MP support you
- Summarize what action you are requesting from him/her.

Name of workshop: *Meeting with MPs on the Hill*

Presenters: Bonnie Campbell, former OPL Trustee

Christine Langlois, OPL Trustee

Bonnie and I went to meet two Members of Parliament: Bruce Hyer, the independent member for Thunder Bay-Superior North, and Kennedy Stewart, the NDP member for Burnaby-Douglas. We followed the advice of our two workshop presenters and asked the MPs to question the government on the cuts to Library and Archives Canada. As a recently-retired Library of Parliament librarian, Bonnie Campbell was excellent and effectively outlined to both MPs what those cuts meant in term of access to documents and information for people in their respective ridings. Both Mr. Hyer and Mr. Stewart committed to raising the issue with their elected colleagues.

Name of workshop: *CLA Battle Decks*

Presenters: Megan Fitzgibbons, Beth Goslett (Ottawa OPL), Christine Langlois (Ottawa OPL), Danielle Robichaud, Melanie Sellar, Robyn Stockland

Early on the Saturday morning of the CLA conference, the above group of conference participants agreed to take part in a fun improvisational and creativity-based activity. The thrust of the activity involved a competition where participants were challenged to deliver a talk of library innovation as a Powerpoint presentation with nonsensical slides (e.g. a cow and a dolphin jumping side-by-side in the ocean) flashed by.

(I am delighted to report that my presentation was awarded second-place. Let's make sure Ottawa finishes first at next year's CLA Conference in Winnipeg!)

Congratulations to Beth, and thanks to all my colleagues from the Board and all the OPL librarians who came to support our Ottawa team.

Name of workshop: *Strategic Planning: Keep it from Failing*

Presenters: Jim Morgenstern, Partner, Dysart and Jones Associates, Rebecca Jones, Partner, Dysart and Jones Associates

Strategic planning is about excellence and boldly going where no one has gone before. All organizations need to change to stay relevant. Strategic planning is about that necessary change. Strategic planning is one of three core responsibilities of the library board: hire a competent CEO, ensure fiscal responsibility and do the strategic planning.

The main question library boards should ask is:

- What type of library do we need to be in the future?

It should be followed by the following questions:

- What kind of library do we want?
- What do we need to do to get there?
- How should that library deliver services?
- What will the library look like in 5-10 years from now?

There are four main steps to strategic planning:

- Define a vision
- Define goals
- Define directions
- Develop an action plan.

Courage

The presenters explained that, to obtain a result, you have to be courageous. You have to suggest things that will terrify other people. You want to lead rather than follow public opinion. Strategic planning is about being different. It is about what we need to do to be in business and significant five years from now. It's about identifying the stakeholders we want to work with. A board should embrace change, even if it is not comfortable. Strategic planning should be done through passionate discussions. It's about debate within the board, and outside.

As Mr. Morgenstern put it:

"If there is no disagreement in a board discussion, this board is not doing its job. If a library board is not pissing somebody off, this board is not doing its job."

To have a successful strategic planning session, a board has to stick to strategic discussions. It's not time to discuss a new website, or a specific renovation. Strategic planning is not about managing a library: staff can and already do that. Strategic planning should not start by "how will we make it happen" or "can it happen in the short run"? The definition of an action plan comes later in the process. Strategic planning must start with a strong vision of what the library needs to be in the future. Lending material has distracted libraries from their real goal.

One more key to a successful strategic planning session is to commit time for it. The University of Toronto took a complete year to produce its last strategic plan.

The more people are part of the planning, the better. Staff, patrons and non-patrons must ideally be part of the process. The board has to actively engage segments of the community that are no longer library clients. However, at the end of the process, it's the library board that should make decisions, even if the board is not sure of the outcomes. The consultations should not be used to lead the change, but to inform it.

A strategic plan should not be a document in which everybody can recognize himself. It has to focus on three to four groups, maximum. Otherwise, the plan is not strategic anymore.

Strategic planning can be extremely physical. It must be done standing, with masking tape on the floor to really picture the future. It should be done asking questions such as: What are librarians doing? What type of work are they doing? What is the staff doing? What skills do they need? How are patrons circulating in the library? What do they do? Where do they go?

It can be interesting to know patrons perceptions of the library. However, it is much more important to know what they actually do at the library.

Library structures and systems are still anchored in the 20th century. If a board develops a clear understanding of what it needs to be for its community, this board will be able to answer when unforeseen events or new methods materialize in the future.

A board also needs to know what is happening in its community, not strictly at the library. Strategic planning is about what other organizations are doing, in which direction they are going. Libraries focus too much on their patrons when doing surveys. If libraries take the lead from them, libraries won't change. There is a need to connect with non-users, and to see why they don't use the library.

A board should commit to track trends, review research and monitor implementation of the strategic plan. And this research should not come from library journals, or at least not exclusively. There is good, well-grounded research and magazines about future trends out there. The World Future Society organizes a conference every year in Toronto. Board members should go there as part of their research and development effort.

It is essential to measure the progress when implementing a strategic plan. A board should closely measure the progress of its strategic plan efforts. It should collect

information regarding implementation. Measurement should give the board a sense of the ongoing impact of its plan, especially while measuring small projects. It is essential to show this impact, both to colleagues and competitors.

For more information, visit Dysartjones.com.

Name of workshop: *Fostering Employee Engagement: Approaches to Creating Dialogue and Sharing Leadership*

Presenters: Anna Mould, Manager, Development and Service (OPL), Pam Ryan, Director of Collection Management and Access, Edmonton Public Library

Anna Mould gave an excellent presentation of the efforts made by OPL since 2009 to support and increase employee engagement. She specified from the beginning that OPL customers are every citizen of Ottawa, and not only those who use the service.

If recognition and advancement are important to employees, the relationship with the supervisor is still the most important factor for motivation. Anna and her team used crowdsourcing to get feedback and ideas from OPL employees. At the time of the CLA conference in May-June, 23 of 31 ideas submitted and discussed by the employees had been addressed.

Anna is now developing an action plan for 2013-2014. One of the things she learned since the beginning of this project is that employees will tell you if you did it right.

Anna's EPL colleague started her presentation by asking "What can I do to create a learning community?" She got the first part of an answer from business: always involve staff! Quickly, it became clear that to create a learning community, it was necessary to make the patrons feel not only welcome, but also smart.

EPL wanted its employees to contribute to create a space where patrons could imagine, incubate and innovate. One of the things they did was to create ongoing and ad hoc teams, chaired by managers or librarians. EPL then sent an open call for membership to its employees. And from there was born a multitude of small projects, based on the ideas of motivated employees.

For more information, www.guardingmindsatwork.ca.

Name of workshop: *Closing Ceremonies and Keynote Speakers*

Presenters: Evan Solomon (Host of CBC'S Power and Politics, Rob Russo (Canadian Press) and Lawrence Martin (Globe and Mail columnist)

All three speakers agreed that the current Conservative Government was "ideological", however they differed on the nature of that ideology.

For example, Lawrence Martin said the government was by nature anti-intellectual and that it didn't have a noble view of culture. For him, this was the predominant ideology on Parliament Hill right now. "Intellectuals are seen as the enemy," he explained.

Evan Solomon agreed somewhat but argued that ideology does get things done. "Lousy politicians don't have an ideology" he said, "they are opportunistic." Evan Solomon felt there was no war on "facts", however that the current government firmly believes it is not responsible for the dissemination of knowledge. They don't believe it's the job of the centre: "It's a philosophical position."

The arguments of Messrs. Solomon, Russo and Martin on the current government and its perceived views on knowledge dissemination are certainly part of the CLA's reflections and actions on advocacy.