

Report to the Nunavut Library Association:
The Partnership Retreat, August 2011, Toronto

Tuesday Aug. 23-Wednesday Aug. 24, Ontario Library Association offices
NLA Representative: Carol Rigby

NLA is a member of The Partnership, the association of provincial and territorial library associations in Canada. The Ontario Library Association covers nominal travel costs and accommodation cost for the President and VP or other designated representative of each association to stay in Toronto for the summer retreat. As Carol Rigby was in Ontario in August, she represented the Nunavut Library Association (OLA's budget does not cover Nunavut airfare....). This was the second time she participated in the retreat. There were a number of familiar faces, and some new ones. Taryl Gula attended to represent the NWT; some NLA members may remember him from his days in NPLS HQ in Baker Lake.

The first morning every association presented a summary of current activities and challenges. It became evident from the roundtable that associations vary widely in size and financial capacity. Some, like OLA and BCLA, have large memberships (520 in Alberta, 800 for BCLA, 5000 in OLA); some are middling (NL has increased for 2 years in a row, to 214, NSLA 100-125, mostly in the public library sector); some small (NWT now at 35-40 members). NLA is the smallest, and Yukon does not have an official library association.

Many associations hold conferences as a fund-raising mechanism for their associations, although several have cut back on their conferences either due to a tighter financial climate or burn-out in the conference volunteers. Some associations receive government funding (Alberta receives \$75K in funding from the Alberta government, Saskatchewan \$108K from theirs), but most have to charge membership fees or hold conferences for fees if they wish to raise funds for activities.

The report Carol presented on NLA's current state can be summarized as follows:

- We cover a huge geographical space, with a very small population of around 30K
- We are a small association, with a consensual structure; the President is appointed to manage outside contacts with other groups and associations
- Most of us are in Iqaluit, with telephone input from other communities for meetings. Travel costs are prohibitive.
- E-mail is used to stay in touch with all members, work collectively on advocacy issues (e.g. Library Book Rate)
- There are currently no funds involved in the association—no dues, not a registered society
- We now have a web page, with our occasional newsletters posted there, in English and awaiting translation into Nunavut's other official languages.
- We have a somewhat limited participation in the Education Institute (EI) due to the small staff numbers at all libraries—most have only one or two staff, often only part-time. We are still looking for EI-to-Go courses to be offered, to be more flexible.
- It is also difficult for our members to develop courses to offer for EI due to the very low levels of staff, but there is some interest.
- The Partnership's training certification project might be of interest, but would only work if web-based
- Our members work together for initiatives specific to our territory, such as the development of standards for cataloguing Inuktitut materials.

Generally, all the associations had a fairly positive year, with several marking an increase in their membership. Several themes came out of their activities:

- Advocacy for libraries is important
- Professional development for their members is a key benefit of membership, including conferences and access to courses or workshops held either by their association or by The Partnership's Education Institute (EI)
- Web presence is increasingly important. Many are working on improving their websites and communications, including adding blogs or other interactive communication techniques (social networking). OLA is planning a major overhaul of several of their web systems which, they hope, will make it easier to do webconferencing and recording for programs such as EI.
- Many associations have done or are planning to go through the strategic planning process to determine direction, services needed etc. Québec reported on a very successful strategic planning exercise that has given their association several concrete targets to work towards.
- Several associations have embarked on new initiatives, such as partnerships with other provincial groups with similar aims (e.g. associations of specific types of libraries, archives groups, etc.), publishing directories of libraries (NWT updated theirs this year) or library histories, etc.

After the roundtable and a break, Rebecca Jones of Dysart & Jones made a presentation on "Strategic Planning for Associations." She reviewed how to go about the planning process in the context of a small volunteer board with no time and no money; most small non-profit and charitable organizations have the same issues. She discussed the differences between a strategic plan, which usually signals a significant change in direction for an organization, and service planning or long-term planning, which deal more with concrete service goals. Planning timelines could be described as:

- 5 years for a Strategic Plan (especially if changing direction), reviewed annually for major changes to the organization's landscape
- 3 years for a Service Plan
- 1 year for an annual plan

Her key points:

- First, you must be ready to implement the plan; a plan with no concrete tools for implementation does no good
- Second, the discussions are the most important part of the process; the conversation is what is really important.

She outlined a number of techniques for making the process effective (developing ground rules, having a collective working document, discussion techniques); anyone interested in the templates that she went through is welcome to contact her at rebecca@dysartjones.com. She also recommended the Drucker Foundation as a good website for resources for anyone going through the process; www.pfdf.org.

Helpful comments were provided by ABQLA, who had recently done their strategic plan. Their suggestions to get everyone to buy in:

- Break the process into small meetings, focusing on a specific aspect at a time for a specified period, with a decision by the end of the meeting
- Turn negatives around—if something won't work, why not? If it won't happen, what could you do to implement it?

- Present the process as a learning experience
- Performance measures can be very simple and concrete
- Make the process tight—set a schedule and stick to it.

After lunch, a report was presented by the Education Institute, the Partnership's continuing education body. Michelle Arbuckle is a new staff person working on EI programs under OLA, who started in January. Some highlights:

- Print marketing stopped in 2008. There's a definite boost in registration when information is sent out to the listserv.
- They have been shifting focus to fewer sessions with a higher participation rate. Smaller + tighter = more profit.
- There are more options available generally on the web for people to take courses, but the EI ones offer Canadian content.
- They are also trying to improve the appeal of courses for groups other than public library staff.
- They would like to see more sessions originating outside Ontario. There's heavy weight on a few associations for the content of presentations.
- They have been recruiting from presenters at conferences to repackage for EI
- It may be time to re-do a survey on what people want in courses.
- Marketing:
 - The full calendar was about to be released on the web as a PDF for Fall program of 39 offerings: 13 audio, 18 webinars, 3 courses.
 - Websites can be linked to the e-doc
 - There are links from the document to the OLA store for related publications
 - They are developing a social networking plan (Twitter, Facebook, LinkedIn)
 - E-mails with text only sent out as reminders
- A demonstration was given of the new Adobe Connect web platform, which is accessed through the site so participants don't need to download software to use programs. It is hoped that recordings of these sessions could provide a good format for EI-to-Go, as it captures and archives the audio, video, and desktop chat of any session.

For NLA, a key point is that we could set up links on our website for our association members to make it easier to navigate to the EI webpages and offerings (educationinstitute.ca). They can provide us with a copy of the logo to put on our website; it can be made available on the social media as well, if we contact the committee about how to put this on our website.

There was also a positive response to the idea of adding provincial conferences and courses to the calendar, essentially to use the EI as a clearinghouse for provincial professional development opportunities.

There was general discussion of registration and pricing issues, as EI is meant to make money for all the members of the Partnership. We may need to have the option for institutional rather than individual registration, and incorporate statistics to capture multiple users of a session at one site. The EI Committee was tasked with reporting in February on a pricing model including institutional and individual fees, including a pricing model for archived sessions (EI-to-go).

The final presentation on the first day was of the report by the Certification Pilot Project run by the Alberta association (LAA). This project was to evaluate tracking and certification of continuing education

for library staff, to provide them with a record of ongoing professional development. The report is available in electronic format if anyone would like to read it. Key points:

- The program was run manually, because the trial size was too small to warrant database expense, but clearly if it is to be run as a national program, some kind of electronic database tracking mechanism will need to be set up. There was considerable discussion about the issue of finding an inexpensive and stable service provider for this. OLA's new IT structure might accommodate; target was to see if this could be settled by the February meeting.
- Issues about the costs of running the program, what fees to charge etc. were discussed; they will try to develop funding options within 3 months, and circulate to the group by e-mail for a vote

On the second day, a report was presented on the Partnership's Job Board. An item brought up for discussion was the level of fees charged for postings; the group approved a 10% increase of \$5 for individuals and \$10 for institutions. It was pointed out that if we are going to increase fees, we need to improve publicity and marketing. We could make links to the job site more prominent from our individual association websites. This is a revenue generator for associations that are promoting the job board.

A general session was then held on new initiatives. Money is clearly an issue for many associations.

- BCLA asked about how to improve the level of government support; current associations with government funding are SK, ON, BC & AB. Several associations have government liaison but not funding (QC)
- Chair Su Cleyle asked about associations' membership rates, and whether any had increased; a variety of responses. There was some discussion of joint partnerships, or discounts for Partnership members attending other associations' conferences etc. OLA recommended being as diversified as possible for fund-raising, trying to make all events revenue-positive
- Ryan Patrick, the OLA Store Coordinator, gave an overview of their professional literature bookstore:
 - Proceeds of the store go to support OLA.
 - It also supports the Partnership Journal by providing review copies of books.
 - They try to have a quick turnaround as they deal directly with publishers (10 business days is the target).
 - E-readers are a new initiative—hot topic for schools & public libraries. OLA offers discounts on Sony e-readers (better than Future Shop or Best Buy); 6" \$250, smaller \$200, and a 10% discount on bulk purchases.
 - ABC-CLIO sells e-books, which you buy, don't rent; prices based on population served; OLA store can help with purchases
- Direct member benefits: Partnership discounts have been set up with 2 car rental organizations, Delta Hotels, and Rogers wireless. We can put these up on our websites with no restrictions.
- Merchandise marketing was discussed to promote the Partnership; they hope to have some product ideas in place for spring conferences.

A teleconference was held with the new editor of the Partnership Journal, David Fox. Issues discussed included:

- Staffing
 - Need to have someone with capacity to handle some French material
 - Need for assistance with recruiting and selection of replacement staff

- Possibility of a hosting fee for the journal being imposed; alternative Open Source host sites were discussed
- Sponsorship has been provided by University of Saskatchewan (teleconference costs etc.)
- Opportunities for the editorial board to meet, e.g. at OLA superconference, were discussed
- Would like to increase interactivity of the journal; 2 times a year publication schedule is not good for current news
- Revenue generation as a possibility was discussed
- He would like to improve the quality of copyediting/proofreading

The last item on the agenda was a presentation by Kelly Moore, Executive Director of CLA, on the recent changes to CLA's structure and organization as a result of the by-law changes at the May CLA conference. She expressed appreciation of the Partnership's support for the change process, which has taken 18 months to date and will take another 18 months to implement. These changes will be reported on elsewhere.

An issue that came up for discussion was a blistering exchange, conducted in public, between Library and Archives Canada (LAC) and the Canadian Association of University Teachers (CAUT) about the perception by CAUT of cutbacks and degradation of LAC's professional services. The correspondence includes erroneous information on both sides. CLA was copied in on this correspondence, as were some members of the Partnership. CLA is trying to keep a positive dialogue going with LAC, so have not addressed this issue formally. Reference was made to LAC's attempts to discuss service issues with its "stakeholders," of which it seems to have a very limited concept. Carol asked how our associations could get noticed to be included in stakeholder discussions, and Kelly's response is that is not clear. LAC is in total flux, with continuing reorganization, and CLA doesn't know who is in charge of stakeholder engagement and participation in meetings. They are hoping to meet with LAC's new "Director of External Relations." It was decided that CLA will take the lead with liaison with LAC, and will pull the Partnership in as an advisory group for any discussions.

Given ongoing issues with AMICUS and its lack of Unicode functionality, and the need for AMICUS as a cataloguing tool for small library systems across the country, Carol would be interested in contacting Kelly Moore to be kept in mind as an NLA point of contact for stakeholder discussions, if the group is willing. This was not mentioned at the meeting there, however.

The next meeting of the Partnership was set for January 31, just before the OLA Superconference, February 1-4, 2012. Again, OLA will provide free registration for Partnership attendees to the conference but they will be responsible for their own transportation and accommodation.

Report submitted by Carol Rigby.