

Report to the Nunavut Library Association on the Winter 2014 Retreat of The Partnership

Toronto, January 28-29, 2014

Submitted by Carol Rigby

I attended the winter 2014 retreat of The Partnership on behalf of the Nunavut Library Association.

Association roundtable

The first morning opened with a roundtable session highlighting activities of the different provincial and territorial library associations. The roundtable was broken up to allow a facilitated session by Stephen Abram and a meeting with Marie De Young, new President of CLA, but provincial and territorial highlights are as follows:

- Louise White, President of APLA noted that the association filed a complaint re: LAC code of conduct with the federal Information Commissioner. She noted that a new version has just been published on the LAC site, substantially different in style, not sure about content, but her gut feeling is positive, more supportive. APLA's Lou Duggan made a presentation to RSC, focusing on school libraries. This year the conference is in Moncton, initiating advocacy prize.
- Jeff, NSLA—membership has shrunk a bit, some lack of engagement, looking for inspiration, focusing on training & development. New PR campaign next year (advocacy for libraries)
- Catherine Rose, NLLA—the association is getting to be more about social and professional development activities. They have two annual conferences, and new process for election. Their big story is advocacy—getting contact & acknowledgement from the NL government. Also some libraries have been shut down, and they are trying to find out what's happening in context of current government upheaval.
- Co-membership working well with APLA & NSLA, NLLA executive connections as well.
- LAA Lisa, Conference coming up, Apr 24-27, the highlight of their year. Offered free memberships to library program students starting this year, positive response. Elections coming up, member engagement important, working on implementation of a survey. Presented a brief to RSC, focusing on aboriginal services. Created a disc about the first public library on a reserve in Alberta. Also discussed rural library service.
- Robin, President of ABQLA, conveyed exciting things going on—had had a culture of poverty, though always OK financially. Have always done well with conference & shared conferences. Were racking up dollars but no one wanted to spend it. All about member benefits. Now have free membership for students to grow the membership base, 40 new members since rolled out Jan 1st this year. He anticipates doubling the numbers of membership (2 lib schools, several CEGEPs), including francophones. Also offer \$1K bursary for 2nd year students—a lot of work, new chair for awards committee. Also offer 2 \$!k travel awards to members for travel to conferences, pd. Working on rolling out EI & continuing devel through Partnership
- Anita—pres elect of OLA. Shelagh—a lot of OLA activity covered by Steven Abram. Revitalization of strategic plan, having a VIP conference (value, influence, positioning)—prep for upcoming elections so government will understand messaging. Big priority is school library situation, starting to make some headway with the Ministry of Education (new development), they are actually doing some public consultations. Will be presenting to RSC panel on Friday (scheduled conversations)0. Forest of Reading goal is to spread program, Festival of Trees event in London this year. CBC Kids partner on board
- CR for NunavutLA—we have a small membership (a focus group for Abram!), not segregated by type or level of employment, very consensual, involve pretty much everyone in the library community. We hold 1-2 meetings per year in person, regular e-mail communication from

president. We carry on advocacy work by e-mail: this year letter re LAC staffing. Submitted a brief to RSC. Working on developing website. President regularly pushes out Partnership, EI information.

- BCLA—new mission statement, growing BC libraries together. Big conference coming up, moved to downtown location for more splash, good take up for proposals & enthusiasm. Advocacy, participating in existing campaign but also moving to drafting papers—current on gov't library closures esp DFO libraries. Adding more staff to BCLA office, now thriving. Mentality of scarcity resonated, especially with change to library funding models. Conference has been making money, membership has been growing.
- Robert SLA—Sask has two large cities & a lot of small places—fear that it will be the “Regina Library Association...” so getting out to other communities to talk to people working outside (“president’s reception”)—different circumstances, similar issues, e.g. metrics, HR. New program of small grants for Freedom to Read week. Also working with CLA on library week posters. Made a submission to RSC—verbal conversation rather than a paper submission—rural libraries, aboriginal service, library education. Concern with getting members into leadership roles—most positions by acclamation. Staffing, had an ED in 2012 but she left, 2013 ED did not work out; hope to have someone in place by Feb this year. New program administrator working well (0.8 py). 2nd year of a new structure, just members at large, no sector divisions. New presidents to have a particular focus for their terms. New e-newsletter as well being launched shortly.
- Colleen Manitoba LA VP this year, Pres next year. Small assoc (100 members). No funding for admin support. Get a small provincial grant. New website coming up, to be launched shortly. This is a conference year. Manitoba has a lot of smaller associations, trying to amalgamate a number of the smaller ones to have a strong advocacy voice. Give out scholarships. Library tech program at Red Deer is only library training program in MB. Library prison outreach program run by a MLA committee with subcommittees by type. RSC presentation at U Manitoba well-received

Facilitated session on personas

The roundtable took a break to allow a facilitated session by Stephen Abram, Executive Director of the Federation of Ontario Public Libraries (FOPL) and a library consultant. After giving an overview of his work with FOPL and their advocacy campaigns (especially in the light of municipal elections in the fall), he made a presentation on the concept of using institutional personas as a marketing and service development tool. Personas are psychographic models of how people use a service or product, how our preferences may compete with the needs/learning styles of patrons—preferences in organization of information, information processing styles. The persona concept develops segmentation by goals, behaviours, attitudes. Marketing looks at demographics (age, gender, income etc.) Personas look at behaviours, goals, attitudes—represent people and behaviours. “Archetypes” embody demographic cohorts. Stereotypes narrow perceptions and reinforce prejudices. In comparison to traditional library segmentation (public, school, academic, etc.), personas could be identified, for example, as faculty by discipline; foreign students, new Canadians, etc.; within profession, new librarians; paraprofessionals, volunteers & Friends, systems staff, mid-career librarians, senior librarians, management etc. Segmentation between personas should explain key differences (at least 15% to perceive difference), feel like real people, be described quickly, cover almost all users & avoid edge cases, clearly affect decision making

He explained how the process was used by OLA to create a persona matrix, based on a set of their divisions crossed with personal characteristics (e.g. multitasker, new professional, advocate,

specialist, educator, leader, library students)—using these to develop strategies & tactics. This was for internal staff use—not for public consumption. Personas are NOT divided by professional, tech level, support staff etc. They should not reinforce the “silos” that already exist. Other associations would end up with other groupings depending on context. Could help members anchor themselves within an association by appealing to their behaviour context. Might help shift lens for member engagement for a lot of associations.

CLA Presentation

After lunch, Marie De Young, President of CLA, gave an update on CLA activities.

- Partnership is one of the most innovative things in the library community—commendation
- Issues for them as well—advocacy and member valuation
- Recent brief to RSC presented, 1 hr in Toronto last week
- Last week released tri-agency open access policy (important for academic libs)
- The Executive Council was meeting that week to discuss a position paper on government libraries—recent happenings & lack of leadership at LAC.
- Conference planning for Victoria, which will include a half-day advocacy boot camp for all levels of government and a day of programming on change management leadership
- Challenge is making conference relevant for membership across the country
- Strategic action plan in progress, based on specific activities that members say are important. Should be. up on CLA website soon, opportunities for collaboration with the Partnership. Nov. finance committee meeting—struggling financially, membership 1400, and 1000 are personal members. Conference and membership are the foundation of the revenue stream, not a deep base for office & activities. Networks have now become the backbone of CLA and need to be supported in a material way. Everything is now on the table, relationships with associations across the country. What are potential new models out there? CLA is looking at a very different way of doing business. To do advocacy role which they are good at, what else do they do? What do they stop doing? Have been talking to individual assoc., will be talking to all.
- New ED just started, Valoree McKay; she has experience in change management.

A question and answer session brought out some very frank discussion of the current status of CLA and its relationship with The Partnership and other associations

- ? from Su re division of labour—CLA doing the advocacy role. ? re new academic library fee structure model—has not been successful. Lack of communication re: institutional value for large \$\$membership.
- Louise—need for a national voice on the advocacy front –MDY there will always be a CLA, always a need for a national association, but it may look very different. Maybe not a national conference every year, responsibility for publications. Do well—support members to develop expertise in area of advocacy, networking. Strength will come from working with provincial & regional assoc. to come together & be more effective. Most members of CLA belong to more than one association.
- Looking for the statement on gov’t libraries. Important having one voice for these national issues (LAA).
- Toolkits appreciated.
- Conference issues: Robin—need to have a national conference but it is too expensive. Shelagh—conference useful for certain national issues—maybe need more focus for the conferences. Su—maybe change from a conference to a summit or congress type of headspace. Also the practice of moving the conference around is good in theory, but

- expensive & occasionally in conflict with other associations' conferences—maybe need to go back to holding conference in one location (e.g. Ottawa, for a national conference). Anita—CLA has gravitas, can be placed to attract those who have the power—eg for a summit, could invite CMEC related to school library issues—rather than professional personal development. Similar to boot camps, or Literacy Summit of a few years ago. Consistency of time and place important for planning. I indicated that it was important to have opportunities to meet, supported by electronic meeting capacity, cf Trustee Network
- Lou communications—opportunities to communicate through collaborative channels—important opportunity to grow CLA & Partnership together. Su—opportunity to get input to CLA from Partnership & their collective membership (7500). MDY sees this as a current opportunity with new ED & work on strategic plan. Shelagh eg of library rate—CLA does basic toolkit, OLA took it & customized it for the Ontario library sector. Need to leverage resources. Need for a strong and consistent, unified voice at the government table—CLA can help establish the baseline, to give everyone common credibility.

Certification pilot – Christine Sheppard/Lou Duggan

Certification program—no longer a pilot! June 1 2013 became a program accepting registrations. CF report. Registrations—there is revenue sharing for registrations from an assoc—the more you recruit, the more you get paid...(cheques handed out). Uptake was 49 people Jun-end of 2013. Targets adjusted as they had no idea. Recruitment needs to go through the associations. Have been using EI committee to get the word out. Communication plan put in the report can go out to membership. Ways to promote the ability to track professional development. Website appears to be working fine, easy to use for tracking, Lou has given webinars, not a lot of questions.

Communications plan—has sample tweets facebook posts. Available in several locs. ACTION: We can take info and post to website; also pdf version of bookmark. Work on recruiting sign up (for cash return...)

Next steps—continuing promotion. Targeting big employers. Discussion of payment logistics esp for larger admin centres. Good tool for self-directed learning in many organizations. Need for translation to market in francophone sector. Focus is documenting PD activities, NOT accreditation of any sort.

Education Institute – Michelle Arbuckle/Colleen Murphy

Colleen is stepping down as chair. Lou is taking over as EI Committee chair. See tabled report

Review of trend data from Michelle. Cost range now similar to other webinar series.

Marketing—plain text e-mails to come out twice a month to EI rep.

Working with presenters on improving quality of presentations, takeaways etc. – more consistency CEC credits for the program indicated now.

*Integrating recording sessions to OLA store so sessions can be purchased as a separate webinar. NB TO NLA

Management series planned for summer; new Education Coordinator to be hired in Feb.

Reinforced message that associations should feed in session ideas and, even better, actual presentations. Opportunity for professionals to present. Also combined series like the FOPL or OHLA webinars can partner—free to members but available for purchase by others

Job Board report

Report as tabled presented by Gwen, BCLA—board continues to grow, stats are all up.

BCLA now has third part-time person in office on contract so additional coverage for job postings. Very successful. Su gets daily updates by e-mail, 3-4 postings every day. If recommending it to a job search firm, they need to know which association to credit it to.

Merchandise followup – Suzanne Wice

Info re the new library pull-out pen—merchandizing

Presenting also a new “landing page” for Partnership members to link to the OLA store

Items could be posted there for access. Revenue sharing again. Quarterly promotion of a featured product, can track source, OLA store will share revenue with source association. Can add link to Partnership page of website—library swag here! Good for populating conference bags. Not branded OLA—general library promotion.

Su ? re rotating product—rotating quarterly promotion; Suzanne can also add more items for conference promotion. Price points all under the \$10 mark.

ACTION Check out OLA store for possible featured items—visit store at the conference for other ideas. Link should be live for sale after the OLA conference—they will send around the link

Partnership Journal - David Fox

The second morning opened with a report from David Fox on the Partnership journal. Report tabled. Journal ticking along nicely, last issue published Dec. Submissions in every category; some peer-reviewed, some not. New editors working out well. Timeline is 3 mos for non-reviewed and 4 mos for peer-reviewed articles.

Innovations to website—tracking social media activity clicks etc. measuring current interest & popularity. New material popular. Google scholar profile also tracks citations—journal is being cited elsewhere, steadily increasing since report written. Citations tend to be connected to older material due to time writing cycle.

Staffing—finally have a business manager Linda Ecclestone from Sudbury. Focusing on developing a business plan and budget for journal revenue, from donation, sponsorship etc. She has background in PR & fundraising. Starting from square zero. He asked if there were expectations from the Partnership; Su indicated it was the only Partnership service that does not generate revenue, but does provide value. No expectations at yet, but if possible to generate revenue, might be able to issue some honoraria, return to group etc. Need to see results of environmental scan. In our favour is that the journal is now an established entity, stable, good value.

Currently without news& announcements editor; wondering about continuing this in a publication that comes out every 6 mos. Not an active section of the journal for years—will be discussing whether to let the position lapse tomorrow. Su—what included up to now? Early years editor harvested info from associations and was re-publishing it. Partnership has used website rather than journal for publishing announcements. Maintenance issue, a blog would be reproducing material in other locations. Fox would like to see the viewpoint section more used. Partnership group will support whatever the editorial team decides on the news front.

Issues & challenges—problem with Creative Commons license-2 places on site, 2 diff licenses; Morrison suggesting they reconsider it, will be up for discussion at editorial meeting. Su—making sure indexing is OK; also making sure no negative impact on what has been published to date. Any changes would have to be communicated to already published authors; also issue of revenue generation. OLA is signatory; no contract signed yet for full-text searching with e.g. ProQuest (OLA). Murkiness as to what authors have agreed to (Gale license specifies that we are giving them full rights to capture and use as they see fit). The metadata is free and not copyrightable, but full-text content can't be used without permission. Louise will attend meeting (knowledge from univ context, CKRN etc.). Fox will report back on results of discussion.

Have stopped HTML view for articles, just publishing PDFs, which is the official version for citations; had made efficiencies in production, no objections as yet.

Bibliographic style still under discussion—only library journal using MLA style at present.

Coming issue business as usual.

Fox has completed 3 years of being editor, thinking he may do it for one more year—loves doing it but a big time commitment. Will try to do a succession plan over the next year, do two more issues. Might continue in some other capacity. He's retired, might be good to have an active librarian at the helm (no travel budget for conferences, staying current). Will let editors know at meeting tomorrow. Su—let group know, will have P board be part of the search committee. The time commitment is a big issue and will have to part of the search process.

? re reviewers—they keep a database, about 200 on tap, always looking for new reviewers—they can register onsite; Su—Partnership will put out a call to publicize.

Partnership mandate/revenue checkin

Review of fall teleconference on this issue as per e-mail conversation documentation

Question re desire/value for F2F meetings vs teleconference

Shelagh—cost issue re: having the August retreat; this year's budget half of usual 14-15K, revenues down & needed for IT infrastructure etc. Do have some funds just not as much. Question—would half be enough to fund one rep from each assoc? What they do is fund transportation hotel & meals. Why? Important to them; largest assoc, they're the biggest group and have advantage of good draw for their conference. Long tradition of doing this & want to maintain, even at a reduced level. Up until now, support has been for two reps; proposal would be for support for 1 rep and another member welcome to come but w/o support (maybe sandwiches....). General consensus that that will work. NB also association professional development sessions within the retreat, good value for the associations. On for this year—August 19-20 (Tues/Wed) proposed dates this year.

Lou—talking about EI & CEC and representation on the committee—important for messages to go out for participation, communication coming in for possible topics. Membership on those committees is critical. Varying levels of engagement from people who sit on the committees, especially with teleconference. May redraft expectations for members, emphasizing how important these people are to the future of the program. Lou—next activity on their list; should there be boundaries on terms on the committee? Pros and cons—commitment of committee members is the key issue. Suggestion to use assoc conferences as source of ideas

Action—committee chair to come up with document outlining committee participation expectations.

Action—ask associations to work with their conference planning groups to suggest presentations that can be converted to EI webinars (presented or proposed that don't make it to final program)

Concern about website for Partnership—getting a bit outdated. Hosted by OLA—wondering if there something that can be done to keep the content up to date OLA website manager happy to maintain but won't do content. Action—set up a committee to help keep material up-to-date. Su, Kate, Crystal, Anita will look at it.