



12.

To: Toronto Public Library Board – May 12, 2003

From: City Librarian

Subject: **Library Consortia Activity in Ontario – Status Report**

Purpose:

To inform the Toronto Public Library Board about current library consortia planning activities in the province of Ontario that could have a future impact on the Toronto Public Library.

Funding Implications and Impact Statement:

There are no funding implications for the Toronto Public Library at this time.

Recommendation:

It is recommended that the Toronto Public Library Board receive the *Library Consortia Activity in Ontario – Status Report* for information.

Background:

Early in 2002, the Library Board received an information report on the Ontario public library strategic planning process and the resulting discussion paper *Building Value Together: A Vision for Change for Ontario Public Libraries (BVT)*. The latter report reconfirmed the need to establish a coordinating body or agency for public libraries in the province in order to increase libraries' capacity, both singular and collective, to plan for the future and enhance services for users. Upon receiving the report, Toronto Public Library Board directed that staff continue to participate in discussions and monitor activities as appropriate.

Toronto Public Library is one of the largest public library systems in the world and one with a full range of sophisticated and specialized in-house resources. As such, it does not always derive the same direct or degree of benefit from cooperative ventures as small libraries with more limited financial and human resources. However, Toronto Public Library is the one public library in Ontario with a legislated mandate to provide library services across the province, a mandate that carries with it an annual \$1.45 million in provincial funding. Toronto Public Library's resources, expertise and provincial services mandate combine naturally to produce a valuable leadership contribution to multi-library discussions and planning. Toronto Public Library staff have participated in all of the public library forums that have been addressing the need for cooperative activity.

Comments:

Building Value Together's call for widespread discussion of a library coordinating body or agency has been realized in the library community in the past year. A number of existing and purpose-convened forums have been used to advance the work of the Ontario strategic planning process and move the concept of consortia activity into more concrete detail. While there have been a number of separate group processes at play, discussions have demonstrated a high degree of convergence about the need for and the nature of a coordinating body for public libraries in Ontario. This report provides the Board with an update on those major planning initiatives.

Chief Executives of Large Public Libraries in Ontario (CELPLO)

Following the publication of *Building Value Together*, CELPLO began a series of discussions to develop a response to that document. The outcomes of these discussions were:

- an endorsement of the principles and values in BVT;
- a commitment to working with other libraries across Ontario; and
- a commitment to move forward in a positive way to advance the public library position in the province while taking into consideration size, geographic location and diversity to insure an inclusive process.

CELPLO further endorsed the creation of a “federation” of public libraries in Ontario that would focus on and increase library capacity in four priority areas:

- Purchasing
Development of a purchasing consortium that will: provide the best price and best contract terms; be able to influence or direct product development; provide a representative voice to vendors and be capable of developing partnerships and alliances with other existing or new library consortia, e.g. Ontario Digital Library.
- Marketing
Development of more effective, strategic, marketing and branding initiatives that are more aggressive, more professional, research-based, and make more extensive use of multiple media (e.g. billboards, TV.).
- Research
Development of a research function that will: support marketing needs (e.g.. demographics, attitudes); address product questions; identify organizational solutions from other jurisdictions; support the development of public policy, legal, human resources, financial and administrative issues; identify best practices; provide a clearing house for current trends and developments.
- Advocacy
Development of programs that will: be directed to library customers, funders, political groups (e.g. AMO), decision makers; bring a proactive approach to negotiating grants and partnerships, provide a representative, clear, authoritative and knowledgeable voice that provides credibility from a 'third party' point of view.

As a result of these deliberations, CELPLO agreed to move forward with two distinct but related initiatives: a pilot project among its members for the joint acquisition of a limited number of electronic information resources; and, an invitation to other public libraries and organizations to participate in planning for a library federation. The Strategic Directions Council endorsed both CELPLO initiatives in October 2002.

Toronto Public Library was asked to take the lead in developing the CELPLO pilot project for electronic resource acquisition and accepted that role on the understanding that any costs it might incur in so doing would be born by CELPLO members. A proposal for a pilot project will go forward to the May CELPLO meeting. CELPLO's invitation for other public library participation was readily taken up and a broadly representative group met through the fall and winter with amazingly similar outcomes.

Joint Meetings of Representatives of Ontario Public Library Organizations

Through a series of meetings and its own process, this group also endorsed the need for federation to facilitate cooperative action that would be open to all libraries in the province and identified the same four priority areas for attention: marketing, purchasing, research and advocacy. The group took the CELPLO work further and documented more detail around a future federation of Ontario public libraries that included a proposed mission and mandate, values and principles, keys to success (guiding principles, concerns and success indicators), governance and structure, potential funding sources and a process for moving forward.

The Joint Representatives developed a federation model based on the Association of Municipalities of Ontario (AMO) as a starting point because of the advantages such a structure afforded:

- a caucus structure that could accommodate the range and geography of libraries in Ontario
- potential for inclusions of affiliated groups
- membership funded and driven
- board and executive leadership
- combination of politicians and staff
- dedicated staff with delegated authority
- a structure funding municipalities recognize

The Joint Representatives presented their proposal for the implementation of a federation of public libraries of Ontario to the Strategic Directions Council in December 2002. During the time the Joint Representatives were working, the public library trustees in the province were involved in plans to reinvigorate and refocus trustee roles and advocacy priorities. This work was symbolized by the creation of the Ontario Library Boards Association. At SDC it was agreed that the respective efforts of trustees and staff on behalf of public libraries would be strengthened if their initiatives were merged into a single process. It was further agreed that the concept of an AMO-like federation that was endorsed by SDC would be presented to the library community at a session of the OLA Superconference in February. The presentation was received positively by some 80 session attendees.

Strategic Directions Council (SDC)

With the linkage of trustee and staff processes, carriage of the federation initiative as an outcome of Building Value Together returned to the Strategic Directions Council as the umbrella group with the broadest public library stakeholder representation. SDC will strike a Task Group to further develop the concept, develop a business plan for a public library federation, a timeline for its implementation and a communication plan for the public library community. The objective, while aggressive, is to announce the creation of a federation at Superconference 2004. Toronto Public Library as a member of SDC will have a position on the Task Group.

Ontario Digital Library (ODL)

Beyond the public library community, planning has been underway to create a multi-sector library cooperative or consortia. For the past two years, the Ontario Library Association has acted as a catalyst, bringing together the stakeholders needed to create the Ontario Digital Library – a partnership-based organization that would provide seamless electronic information services and resources to the citizens of Ontario. This initiative is a multi-sectored one that would include Ontario's 5000+ public, university, college, school and government libraries. The ODL will be an incorporated non-profit organization governed by a Board of Directors elected by a voting membership.

The purpose of the ODL is to provide equal access for all Ontario citizens through a collaborative and resource-sharing portal that will provide organized, comprehensive, authoritative and validated e-information resources to meet the needs of users at all stages and in all aspects of their education, life and work, e.g. reference resources, subject guides, educational tool-kits, journals, books, maps, etc.

The ODL catalyst team has developed a three-phased approach that would see a fully implemented ODL by January 2007. Phase 1 will be the development by September 2003 of a business plan that will define the ODL's services, funding, governance and implementation plans. Stakeholder groups and the Ontario provincial government will jointly fund the cost of this phase (\$150,000).

A Business Plan Steering Committee that will oversee the business development planning and commitment process is currently being structured. The Steering Committee will have a member from the Ontario Library Association and two members from each of the four participating sectors: schools, universities, colleges and public libraries public. Toronto Public Library will be represented by the CELPLO nomination to the committee. Peter Rogers of the OLBA has been named Chair of the Steering Committee. Peter is a former school librarian and experienced library trustee. He is Past President of the Ontario Library Boards Association, a member of the Hamilton Public Library Board and a trustee appointee to the Strategic Directions Council.

Conclusion:

Planning for consortia/cooperative capability among libraries in the province has been under review for the past two years. There is now a general consensus among public libraries that a federation would provide the strong voice and collective capacity necessary to make effective use of limited resources and maximize purchasing power through economies of scale to provide

enhanced library service in all communities across Ontario. A federation also positions public libraries as a sectoral participant in the Ontario Digital Library. Discussion at the theoretical level is giving way to the development of detailed business and implementation plans. As Ontario's largest public library, it is important that Toronto Public Library, with its legislated mandate to provide services at the provincial level, continues to have staff actively involved in this planning. Such participation facilitates ongoing Board and staff awareness of the issues, any potential impacts on Toronto Public Library and its resources, and an appropriate role of Toronto Public Library in any future organization created as a result.

Contact:

Linda Mackenzie, Director Research and Reference; Tel: 416-393-7133; Fax 416-393-7083;
E-mail: lmackenzie@tpl.toronto.on.ca

City Librarian

List of Attachments:

Not applicable.