January 28, 2014

Royal Society of Canada

Re: The Status and Future of Canada's Libraries and Archives

Counting Opinions (SQUIRE) Ltd. offers the following viewpoints on those questions where we felt we had something to say.
Thank you to the Royal Society for undertaking this most important (and indeed critical) of studies.

The Counting Opinions Team.

Framing Questions:

Services

2. Libraries are currently hybrid operations, constantly pulled toward traditional services by many core users and pulled, equally, by a concern for relevancy for other users and potential users. What issues are libraries facing as they try to make the transition to new service models?

Having/determining relevant, quantitative and qualitative performance measures to support informed decision-making and demonstration of value.
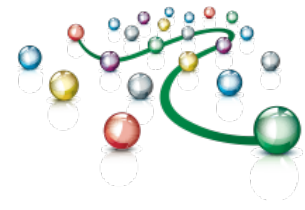
3. How do libraries measure outcomes of their service and community impacts?

The library community is abuzz with demonstration of value using "impact and outcome" measures. But measuring effectiveness is often much more difficult than traditional input, output and process metrics that are more about measuring efficiency. As such, library management teams that currently do not capture and employ so-called traditional performance measures in their organizations will be significantly challenged with trying to capture and employ impact and outcome measures.

An analogy.

While many third world nations were able to leapfrog from no telephone infrastructure (wires and poles) directly to wireless technology, there is really no such opportunity to skip over the capture and use of traditional performance metrics. The measurement of impacts and outcomes typically require "measurement-over-time", sometimes requiring pre- (baseline) and post-measurement, and require interaction of users (customers) after their consumption of library services. This is further complicated by issues including privacy and permissions that are required to track user outcomes and qualitative feedback.

And there is still a need to capture traditional input/output measures so that the realization of outcomes has a context (e.g., cost/outcome, time-to-outcome, etc.). This contextual information also enables the comparative peer analysis often using key ratios. This implies that only those libraries that are effectively tracking traditional measures are likely readily capable of capturing "outcome" measures. As such, competency with capturing and reporting the so-called traditional measure are, in our opinion, fundamental starting points.
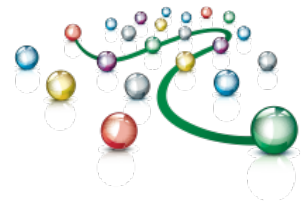
Community Outreach and Awareness

1. Would Canadians know of, or understand, the contribution libraries make to library/archival service in Canada?

The world is moving ever more quickly with new technologies, modes and mix of service delivery and user expectations. The notion of core library services and the archival process is changing and become becoming more obscure. Expecting Canadians to understand the contribution of libraries is increasingly challenging. National and provincial institutions and associations should become far more proactive in providing a coalescing public understanding and support for libraries and also alignment of library services with current and future stakeholder needs. Typically, this type of shift does not happen overnight. In some instances it requires assessment of local needs and adjustments to services, priorities and mandates ... and likely new sources of funding. Libraries may well need to better fund their associations to support/coordinate such efforts. Library leaders and key stakeholders need to step up and recognize that demonstration of value that is aligned with stakeholder goals and objectives is increasingly important in this era of rapid change.

New Directions

Digitization

2. What will be the function and future of a brick-and-mortar library or archive in a paperless future?

There is no doubt that the notion of core library services is in a state of transition. And while prognostications of a "paperless" society have been around since the early days of "office automation" starting in the late '70's, the ease of access to an ever increasing amount of digital, multimedia and web-accessible content combined with the proliferation of web-capable devices, the concept of a "paperless" library is certainly more compelling now than ever. The role of libraries as repositories of content (paper in
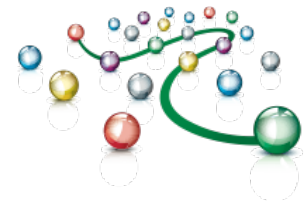
particular) is also impacted by a dramatic increase in disintermediation with web accessible content widely available through various non-traditional sources including self-published and digital content repositories such Google Books, Project Gutenberg, Open Digital Library, Tower Babel, etc.

Especially in increasingly diverse communities, the influence of traditional "gathering areas" (church/school/etc), have significantly diminished. Libraries (public in particular) represent "neutral" community space for learning, interaction and play. And while many groups flourish online via social media, human interaction at physical locations (other than coffee shops and sporting venues), will continue to represent opportunities for libraries, we believe, to deliver societal relevance -- provided the community recognizes/can be convinced to persuade their politicians that public libraries are important (for a variety of reasons) and need to be adequately staffed and funded.

Education

1. What changes, in your judgment, are necessary in the professional education and training of librarians/archivists in the 21st century?

More emphasis on effective, funder-aligned decision making and persuasion strategies i.e., demonstrating value.

2. What conversations do you think need to take place with library, archival, and information studies programs about professional competency requirements, and have they begun?

Many library schools appear to be constrained by irrelevant emphasis is increasingly marginal services and a lack of emphasis on the competency requirements of future library workers and leaders. Library schools need to find ways to overcome HR issues that currently constrain innovation, change and relevance. This includes employing professionals who are more relevant to current and future library competency requirements…which in
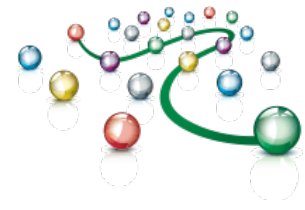
turn requires much more communication between institutions of learning and those organizations who traditionally hire such students and graduates.

Resources

1. Public libraries are primarily funded by local municipalities, with little funding from any other level of government. Many towns and rural communities are too small to support needed technology. How do we encourage the creation of library systems (or consortia) that can meet the increasingly sophisticated technology-driven needs of libraries -- whether urban or rural?

Grants and fundraising are certainly options … but these take time and resources and specific skills … and these may indeed not be readily available. Plus libraries need to wary of budget requests being reduced by the financial results of fundraising.

Public libraries (and academic to a lesser extent) are relative newcomers to the world of bare knuckle competitive-based resourcing. We would argue that a library (large urban or small rural) <u>can</u> have a decided impact on its resource levels by way of professional, valid arguments. Frankly, it is called "competing ...and winning!"

A large part of this falls under the moniker of "Community Engagement." Improved local library community benefits' marketing; public relations programs that embrace funders - involve local, provincial and federal politicians in library activities … and don't forget to invite the media; organizing speaking engagements - both Board members and staff - delivering the desired message(s), etc. Some (but not all) of these kinds of efforts are enhanced by having quality metrics to weave into the messaging. In our experience, libraries have a major advantage in the competitive-based resourcing arena -- when they have the proper support tools -- typically, they are much better storytellers than any other group that they will be competing against!
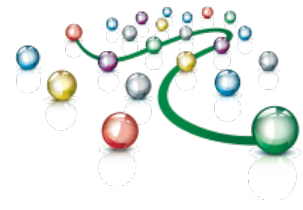
Consortia

From a vendor perspective one of the big challenges is that most consortia, while wanting consortial member discounts, do not bring their consortial members to the table. Vendors are expected to provide discounts but still incur all of the individual marketing, sales and support costs that are typical of an individual sale. If consortial groups want to truly have a positive financial impact on purchase costs, they need to bring their entire membership to the purchasing table.

2. Assuming academic host institutions have financial resource constraints, and assuming academic libraries are equally constrained, how might these libraries attract funding to meet the expectations of others?

Same as 1) plus fully appreciating that they (academic libraries) are increasingly required to contribute in meaningful, measurable, demonstrable ways their results/outcomes against the overall institution's goals and objectives.

We would also argue that academic libraries can not continue to ignore the fact that large numbers of their institutions' graduates have never, or very seldom, used the library. We would argue that the goal of having informed students/graduates who can "think" and "effectively access/resource information" would suggest that those students need to be trained on the skills they need in an "information-based" world. And, many academic library staffers need to expand their customer support skills -- especially with 1st year students. The analogy is quite simple – if go into a store/restaurant and you get what you perceive to be poor service, guess what? You do not go back!

Until academic libraries can demonstrate their impacts on their institution's goals and objectives, they will increasingly be seen as cost centres (overhead). And one of the key efforts of every organization's executive team is to "cut overhead." Why?...because every dollar that is saved falls directly (100%) to the bottom line.
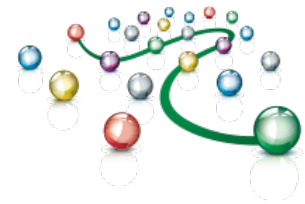
By way of a suggestion,

1) academic libraries might be wise to convince their institutions to implement a mandatory (term or partial term) "How to use the library" course? While not a new idea, it gets 1st year students through the doors and provides the library with the opportunity to build relationships and, instill access-to-information skills that will serve students well throughout their academic and post graduation careers.

2) confirming the relationship between "use of the library" and "GPA" (or the equivalent) is, in our view, a very compelling opportunity for advocacy with senior institutional managers and their funding bodies.

Note: A number of academic libraries around the globe are heavily engaged in this "holy grail" effort.

And why is this?

When the institutional funding formulae in many jurisdictions are examined, revenue increases often equates to increased enrollments. We would argue that those institutions that can use their library (and its proven impact on student success) as part of their "student acquisition and retention marketing efforts" this will result in a) parent's of first year students will likely to be easier to convince to write tuition cheques and b) the libraries in those institutions will be not be seen as cost centres and will be much more likely to end up with enhanced funding results.

Additional

As opposed to the United States model, libraries (public in particular) in Canada are seen to be primarily within the sphere of Provincial and Municipal influence. The lack of a Federal perspective is in stark contrast to that of the U.S. where the Federal Government sees public libraries as an instrument for the contribution to and in some cases, the execution of national policy initiatives (literacy, entrepreneurism, etc.). We believe that the contribution that libraries can make to federal initiatives is currently a glaring "missed" national opportunity