

**Symposium on a
National Network for Equitable Library Service**

Wednesday, February 27, 2013

9:00 a.m. – 5:00 p.m.

Ottawa, Ontario

“As Was Said” Notes

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“As Was Said” Notes

Symposium Objective: To develop a joint strategy for implementation of a National Network for Equitable Library Service.

1. Current Status

Participating organizations provided updates on their existing activities in support of provision of equitable library service (see Annex B, page 12). At the conclusion of each update, participants responded to the following focusing question: “What have we just heard that should be included in, or strongly influence, our joint strategy for the National Network?”

Provincial-Territorial Public Library Council (PTPLC)

- best practices
- identification of stakeholders
- open source for content
- constraints we might be under (e.g. how provinces and municipalities might perceive open source when they have their own technologies)
- needs to be accessible
- communications strategy defined
- a number of models are on the table
 - identify how they work together
- accessible
 - able to access through public library or directly via home computer
- timing of the provision of material is transparent and predictable

B.C. Libraries Cooperative

- various formats
- customer service
 - material available in formats that customers want
- needs to be national
- expertise, knowledge, and systems are available in each province
 - there exists a fully functional model and knowledge of best practices
- savings of time and money

Canadian Association for Educational Resources (CAER)

- don't reinvent the wheel
- take advantage of CAER infrastructure, resources, collection, production systems, delivery and return systems
- clientele not just visually impaired
- need to "future proof" the products, etc. to ensure they can be used by the clientele
 - compliance standards, interoperable, leveraging across sectors, Canadian hosting, etc.

Canadian Urban Libraries Council (CULC)

- issue of libraries in centres with fewer than 100,000 people
- public libraries are the main service points (with the exception of educational materials)
- library ownership and investment
- need for service by small, rural, and First Nations libraries
- inclusive strategy
- recognition of diversity of clientele population

CNIB

- need to define clientele so not missing anyone
 - age
 - visual, auditory, perceptual, physical, etc. disabilities
- some solutions might be marketable (e.g. ESL material)
- public libraries already have material for repository
- internationalization
- opportunities for other countries to access Canadian data might lead to revenue sharing, etc.

Canadian Library Association (CLA)

- library leadership
- need for library training/professional learning regarding disabilities, formats, technologies, etc.

2. Issue Identification/Key Results Areas

Participants began by brainstorming around the following focusing question: “In thinking about developing and implementing a joint strategy for a National Network for Equitable Library Service, what are the major issues and challenges that must be addressed?” The ideas were posted, then summarized into the following themes (Key Results Areas). See Annex C, page 15, for the individual brainstormed ideas regrouped by theme.

- a) How to Fund All This
- b) Need for Collaboration to Avoid Duplication
- c) Delivery Based on Users’ Needs
- d) Structure of Governance
- e) Technology
- f) Consensus on Network Design
- g) Production Infrastructure

3. Network Design Characteristics

In considering the seven Key Results Areas, participants felt that they first had to identify the characteristics of the Network design before they could meaningfully engage in discussion of the other theme areas. As a result, participants shared perspectives around the following focusing questions: “How would we know the ideal Network design if it came into the room? What would be the primary characteristics of that design?”

- don’t have to go to libraries to get a book
 - seamless for end user across sectors
- sustainable and predictable costs
- user satisfaction
 - timely delivery
 - multiple formats
 - chosen point of entry
- staff capacity and competence
- all stakeholders have a sense of satisfaction in their participation
- new overlay organization to collaborate?
 - can collaborate now without a complex organization
- public libraries assume role outlined in various papers
- inclusive of all types and sizes of public libraries
- sliding scale of fee structure to accommodate libraries’ various abilities to pay
- “owned” by the library community

- each user can choose points of access and delivery that will meet user's needs
- broadest possible network purpose-built (not just CNIB and CULC)
- broadest potential user base
- fill niche left by federal government
- high collaboration across sectors
- transparent communication
- working inter-dependently
- attitude of "giving" rather than "getting"
- reduction in duplication of processes (e.g. production in alternative formats)
- records held in one organization are accessible from any other organization
- CLA has an organizing role
- clarifies "public service" side versus "technical services" side
 - B.C. Libraries Cooperative role to help avoid re-creating the wheel
 - co-op structure helps minimize risk and provides an effective governance model
 - focus on building capacity and extending services to users
- uses CANARIE network more extensively
- addresses high costs of production of materials
 - e.g. libraries digitize and produce books
 - works closely with the five major producers of alternative-format materials
 - minimizes expectations on individual libraries in production, but maximizes strengths in community outreach, cataloguing, etc.
- continue doing what we are doing while developing alternative collective approaches
- door always open to new partners, formats, delivery, production, etc.

4. Value-Added of Participating Organizations

In order to become more familiar with the various organizations participating in the Symposium, participants shared their perceptions of the value-added that each would bring to the Network.

a) Canadian Urban Libraries Council (CULC)

- nimbleness
- have a “skin in the game”: involvement and responsibility are not optional
- members have the infrastructure and capacity to take on responsibilities
- 41 member libraries represent more than 80% of public library budgets
- national structure
- willing to jump in
- funding
- links with publishers

b) Canadian Library Association (CLA)

- broad-based and cross-sectoral membership
- ability to bring stakeholders to the table
- expertise through its Advisory Committee and Network
- long history on this issue
- strong connections to federal government and Library and Archives Canada (LAC)
- relations with relevant international bodies (e.g. International Federation of Library Associations - IFLA, World Intellectual Property Organization - WIPO)

c) B.C. Libraries Cooperative

- infrastructure
- governance model
- engagement with library software development community
- do a lot of both open source and proprietary software
- administration and risk tolerance
- each member of PTPLC is a member of the Cooperative

d) CNIB

- links with publishers
- funding
- client database
- best practices
- delivery of alternative-format products and services
- fully bilingual in service and production
- technology infrastructure in place to deliver services nationally in any format
- international relationships
- trusted intermediary
- content/collection
- serves broader public
- has relationship with public libraries in their delivery of alternative-format materials

e) Canadian Association for Educational Resources (CAER)

- best practices for providing alternative-format materials to students in a timely manner
- expertise in producing materials
- repository where materials can be downloaded
- system is accessible
- no central funding
 - distributed funding model
- no bureaucracy
- links with publishers

f) Provincial-Territorial Public Library Council (PTPLC)

- policy support in government
- funding
- lifeline for small libraries
- some members are provincial librarians
- all members are employed by governments
- nationally representative
- connection with Library and Archives Canada

Participants then identified what is still missing from the value-added that each brings and that would be important to the success of the Network.

- sustainability
 - governments (especially federal)
 - private funds would supplement public funding
 - sources of public funding would be:
 - Human Resources and Skills Development Canada (HRSDC) Office for Disability Issues
 - Industry Canada
 - oversight of cooperatives
 - links to software development industry
 - provincial governments (especially Ontario due to AODA)
 - building overall library capacity to serve all users

5. Moving Forward

CULC and CNIB feel the need to get an early success.

- will do this through CULC beginning the process of helping CNIB extricate itself from library service provision.
 - CNIB will be a partner, but not a recipient of funding
 - CNIB will still provide service to its clients until there is an alternative
- CULC will facilitate development of a library entity which will use its existing resources to further this initiative
- CULC member libraries will expand service beyond what is currently offered for the visually-impaired
- CULC will take over leadership
 - CNIB will help fund a project manager to develop a model
 - will ensure that all sizes of libraries are involved
- feel that this approach will show a level of commitment to government
- will continue ongoing conversations and future planning with other participants in the February Symposium

It was suggested that CULC and CNIB get other Symposium participants (e.g. PTPLC, CLA) involved at this stage of their planning, and not wait until the negotiations between the two organizations are complete.

PTPLC felt it would be problematic if CULC was seen to be charging ahead unilaterally with a model, and that such an approach could actually backfire.

B.C. Libraries Cooperative anticipated that the CULC/CNIB arrangement would produce anxiety about prices among many libraries. There would need to be more clarity about the CULC/CNIB system being proposed before the Cooperative could be much involved. CULC and CNIB were urged to see the similarities between large and small public libraries, and to reassure the small libraries that they will be protected.

6. Next Steps

a) Circulate additional information about the CULC/CNIB proposal to the other Symposium participants.

Accountability: Catherine Biss and Margaret McGrory

Deadline: June 2013

b) Circulate additional information about B.C. Libraries Cooperative to the other Symposium participants (e.g. technical overview, best practices, high-level repository, general information).

Accountability: Ben Hyman

Deadline: mid-March 2013

c) Symposium participants attend each others' executive meetings held in conjunction with CLA conference (CULC, PTPLC, CLA).

Accountability: organizational leads (Catherine Biss CULC, Diana Davidson PTPLC, Pilar Martinez CLA)

Deadline: end of May 2013

d) CULC and CNIB inform other Symposium participants of API access within the proposed system to ensure that functionality is open.

Accountability: Margaret McGrory

Deadline: when documentation has been prepared

e) CULC and CNIB consider including PTPLC and CLA in its planned proposal.

Accountability: Catherine Biss and Margaret McGrory

Deadline: March 2013

7. Key Messages from the Symposium

- a) CLA, PTPLC, and CULC recognize the responsibility of the public library system for access.
- b) We have a clear idea of what we want in the long term.
- c) We recognize each others' value-added, which is important when entering into a partnership.
- d) We have agreed to take this discussion back to our respective organizations to develop a collaborative communication approach.
- e) More shared information will be forthcoming.
- f) We shall continue the dialogue and conversation toward the bigger vision.

Annex A - Participants' Expectations

As part of their personal introductions, participants shared their views on “what needs to happen today to make this Symposium worthwhile for me and for the organization I represent.”

- would like to see an action-oriented agenda
- bring people together and get things into alignment
- inform groups about where we're at
- make sure we have alignment and a plan
- determine what are the best services to the most users in the most effective ways with the resources available
- consensus-building
- concrete actions that move us forward and meet all stakeholders' interests
- move the needle to an action plan
- action-based agenda leading to implementation
- come together to create an action plan we can implement to allow “my people” to read
- any solution identifies that students need to get material on time
- any solution takes into account current resources and processes that are in place
- information-sharing and ways to better serve print-disabled library users
- set up an action plan that will lead somewhere to the best we can do
- hearing about what is taking place and where things do align

Annex B - Updates from Participating Organizations

1. Provincial/Territorial Public Library Council (PTPLC)

Diana Davidson and Trevor Surgenor

- Council is a working committee of provincial and territorial librarians who often have quite different roles within their jurisdictions
- meet monthly as well as at an AGM
- working on equitable access for quite some time, and has working relationships with several organizations in the field, including CNIB
- priority to pursue accessibility of print materials
- some provinces have strong relationships with CNIB independent of the work of PTPLC
- working with Cooperative to offer new models for equitable access within the structure of public libraries
- building the technical specifications of a proof of concept, and now putting the tangible pieces together

2. B.C. Libraries Co-operative

Ben Hyman and Maryann Kempthorne

- organization works with member libraries across Canada
- first source of Evergreen, and largest source of open-source tools
- expanding the scope and diversity of what can be accessed by public libraries
- demonstrate that open-source tools can work at a high level and a large scale
 - can move very quickly with current technology
 - aim to develop capacity for public libraries in Canada and around the world
- have developed a best-practices document
- currently engaging developers and partners on content, bibliographic practice, collection management, scaling, etc. for a Canadian-accessible database
- have not yet pursued publishers, but looking at how content-producers can plug in

3. Canadian Association for Educational Resources (CAER)

Bob Minnery

- working to ensure that all student requirements for alternative-format materials can be met (either from existing repositories or by facilitating production if materials are not otherwise available)
- nation-wide network of organizations that can share materials
- AERO has agreements with publishers to deposit materials in repository or to produce desired materials
- @20,000 students registered to use CAER materials
- @100,000 items in alternative format
- materials are loaned to institutions, not directly to individuals

4. Canadian Urban Libraries Council (CULC)

Catherine Biss and Moe Hosseini-Ara

- represent large urban public libraries in centres of over 100,000 population
- members want to provide equitable access to published materials
- CNIB has stepped into the breach to address shortfalls in service delivery among CULC members
- CULC wants to take more responsibility for this, while recognizing CNIB's expertise and infrastructure
- several components of what needs to be done, including
 - process reviews in support of cost-cutting
 - development of partnerships to move the initiative forward
 - building on government investments
 - improved knowledge of Canadian copyright law and potential for global partnerships
 - training from CNIB on how to approach and serve customers
 - accessing production facilities of CNIB
 - leveraging existing logistics and distribution available through Canada Post
 - outsourcing of technical services
 - investigating ways to increase revenues
 - taking advantage of existing resources and production capabilities
 - working to provide access through any public library
- regular meetings between CULC and CNIB
- willing to put resources into providing services via public libraries that are currently being provided by CNIB

- the Boards of CULC and CNIB need to approve a detailed plan
- funding via in-kind services by public libraries (e.g. cataloguing, acquisitions, community outreach, access to repositories)
- commitment to fund the hiring of someone to put a new CULC-CNIB organization in place

5. CNIB

Margaret McGrory, Diane Bergeron, and Wendy Robbins

- CNIB Library has existed for over 100 years
- working to stay ahead of the curve of customer needs
- working with similar organizations around the world
- expect new entity with CULC will assume a lot of the responsibilities currently fulfilled by CNIB
- recent steep decreases in budget in part because of drop in government technology investments
- from client perspective, the important point is access to materials in formats that work for clients in their specific contexts (e.g. audio versus brail versus electronic)
 - formats need to be flexible by individual client, not just by broad type of user group
- clients' priority is to obtain material in accessible ways through the public library community

6. Canadian Library Association (CLA)

Ralph Manning, Pilar Martinez, John Tooth, Kelly Moore

- a joint initiative in 2000 by the National Library and CNIB led to several initiatives with the key components of library leadership and library service points
- after some 12 years of progress, now at the point where we need to get all groups together to have a meeting of minds
- initiatives and resources are now in place on which to build an action plan

Annex C - Issue Identification/Key Results Areas

Participants began by brainstorming around the following focusing question: “In thinking about developing and implementing a joint strategy for a National Network for Equitable Library Service, what are the major issues and challenges that must be addressed?” The brainstormed ideas were summarized into the following themes (Key Results Areas).

a) How to Fund All This

- small library financial/organizational ability to participate
- \$
 - sharing/funding model
 - most effective expenditures
- funding a multi-jurisdictional national venture
- affordable model of funding
- how do we sustain a new model or approach?
- funding, in a time of constrained resources
- funding models
 - who is funded?
 - where does funding come from? (i.e. what gets cut so there is \$ to support our strategy?)
- sustainability over the long term
- funding
- sustainability
- sustainable funding model

b) Need for Collaboration to Avoid Duplication

- consensus on direction
 - do we have one vision once we drill down?
- don't duplicate effort: maximize resources
- avoiding duplication of effort
- maintenance/expansion of international partnerships/networks
- work together to avoid duplicating solutions or services
- efficient use of existing resources
- shared responsibility, multiple pathways

c) Delivery Based on Users' Needs

- action (moving forward)
- all libraries need to be engaged
- ensuring inclusivity (all public libraries of all sizes)
- all print-disabled users need to benefit
- captured all stakeholders?
- user input
- how to overcome the multi-jurisdictional nature of the problem in order to ensure a national solution

d) Structure of Governance

- governance
- representative and equitable governance model
- consensus on governance
 - public libraries: all
 - content producers, including CNIB
 - governments

e) Technology

- do we have the technical skill sets to future-proof development?
- network; is a lightweight shared collaboration in sight?
- technology
 - whose design?
 - inter-operable
 - authentication
 - cross-sectors
 - licensed + open
 - training + change management

f) Consensus on Network Design

- transition in service model
- 3 different service models (Education, Large Public, Small Public)
 - these 3 systems must be able to work together:
 - some kind of federated library system for sharing (on IT problems)
 - some kind of overall governance model

g) Production Infrastructure

- production to service model
- ensuring solution addresses all print disabilities and format needs
- user-centric/service-centric
 - user + collections + technical specifications to serve the system of users, not stuff or software
- timeliness of delivery
- new or used: shift of collections
 - should current service design drive conversation?
 - current infrastructure?
 - current 'standards'?
 - current copyright?