
National Summit on Library Human Resources

REPORT
for
THE CANADIAN LIBRARY ASSOCIATION (CLA)

Ottawa, ON
October 6-7, 2008



Prepared by:
The Intersol Group
205 Catherine, Suite 300
Ottawa, Ontario K2P 1C3
Tel: 613.230.6424
Fax: 613.567.1504

Revision: 2009 15 Feb

TABLE OF CONTENTS

Getting Started	2
Setting the Context	2
Welcome	2
The Current and Future Picture of Human Resources in the Library Community	3
Issues and Actions Arising from the 8Rs Research.....	4
Research Findings and Various Strategic Models	5
Promising Strategies	6
Identification of Promising Strategies	6
Draft Implementation Plans	7
Maintaining Momentum	10
Tracking The Changing Human Resources Environment for Planning Purposes	10
How to Move Forward in a Collaborative Way	10
Closing Remarks and Next Steps	11
Appendix A – Meeting Agenda	12
Appendix B – Participants List.....	15
Appendix C – Breakout Groups	18
Appendix D – Breakout Sessions Notes – Identification of Promising Strategies	19
Group A	19
Group B	22
Group C	25
Group D	28
Group E	31
Group F	33
Group G	36
Appendix E – Summary – Promising Strategies and Themes for Discussion	39
Appendix F – Breakout Groups for Developing Implementation Plans	41
Appendix G – Breakout Sessions Notes – Draft Implementation Plans for Promising Strategies.....	42
Group A	42
Group B	45
Group C	49
Group D	51
Group E	53
Group F	55
Group G	58
Appendix H – Meeting Evaluation Summary	59
Appendix I – Sponsors	61

GETTING STARTED

On October 6 and 7, 2008, the Canadian Library Association (CLA) hosted the Canadian Library Human Resources Summit, in Ottawa, to focus on key issues that present challenges to the library community in the areas of recruitment and education. Approximately 115 library stakeholders representing key associations, employers, unions, government officials, educators, and other stakeholders in the Canadian library community took part in the Summit. The agenda for the Summit and the list of participants can respectively be found in Appendices A and B of this report.

The outcome of the summit was to identify the strategies and key actions required over the next 5-6 years to move towards the goal of ensuring an adequate supply of well-educated, well-trained librarians and information professionals in order to meet Canada's knowledge and information management needs in the first three decades of the 21st century.

The Summit objectives were the following:

- To identify promising strategies that will help address the current and future human resource issues;
- To identify the actions that participants and stakeholders will undertake to implement the strategies over the next 5-6 years;
- To determine how the library community can move forward in a coordinated and collaborative way.

What follows here is a report from the Summit. The report is intended as a record of the meeting, to be used by the Canadian library community in continuing the process of developing action plans and implementing the strategies to move forward in addressing human resources challenges. The report includes a synthesis of key messages recorded during discussion, as well as a brief overview of presentations, that will be made available under separate cover.

SETTING THE CONTEXT

WELCOME

Alvin Schrader

Past-President, Canadian Library Association

Mr. Schrader welcomed participants to the Summit and thanked everyone who was involved in making this event a success. He noted that this is a historic moment, as the Summit brings together leaders of every sector for dialog and collaboration on developing a strategy and action plan for a well-educated work force that will meet Canada's future knowledge and information management needs. The Summit is grounded in the 8Rs research; this work is community based and reflects the points of view of the library community; the Summit will focus on the issues of ongoing professional development, filling expected human resources shortages and library science education. While this is a diverse and complex community with different perspectives, common interests and mutual commitment will help this group move forward on addressing these issues collectively.

A panel of presentations provided background information on the context and issues being faced by the library community. Each presentation was followed by a question and answer period which allowed participants to seek clarifications and exchange ideas with the speakers.



THE CURRENT AND FUTURE PICTURE OF HUMAN RESOURCES IN THE LIBRARY COMMUNITY

Joanne Gard Marshall

Alumni Distinguished Professor, School of Information & Library Science
University of North Carolina at Chapel Hill

Don King

Distinguished Research Professor, School of Information and Library Science
University of North Carolina at Chapel Hill

Dr. King presented data from six surveys performed for various types of libraries in the U.S. Survey results give an indication of the future of librarians in the workforce. General surveys and staff surveys provided data on operations, user services, functions performed in house as well as library competencies.

Dr. King presented his findings in terms of the viability of libraries; future demand for Master of Library Science (MLS) librarians; staff structure in libraries, trends in services and trends in competencies. The data presented pertained to public, academic and special libraries in the U.S. The need for professionals in libraries is not expected to be met by the supply of MLS librarians, and significant shortages are expected in the future. Trends in use reveal increases in access to internal collections, external collections and web; whereas e-books, general reference and referral as well as reference tools are showing downward trends in use. Most librarians would choose a career in librarianship again, reflecting the high degree of satisfaction within this profession.

Dr. Marshall presented preliminary results of the Workforce Issues in Library and Information Science (WILIS), a collaborative research project designed to study the educational, workplace, career and retention issues faced by library and information science (LIS) graduates. The survey revealed that LIS graduates represent an aging workforce; people also tend to start their careers in this field at a later age; most are employed and are using LIS skills in their current work, whether they are working in libraries or in other fields. The survey looked at professional identity: librarian, information professional or both and reveals some overlaps between these two. Ms. Marshall highlighted the importance of focusing on retention and the value of flexible work arrangements, in addition to addressing recruitment. The volunteer workforce could represent an untapped resource.

Questions and Answers

The following key messages emerged during the question and answer session:

- The age of retirement varies widely; various countries are amending their policies to retain workers.
- Valuing the experience of older workers and implementing the concept of a flexible work force are good ideas; different and diverse career paths would help to recruit and retain employees.
- Employment contracts to engage workers are in use in some places.
- The causes influencing the lack of diversity in the workforce are not known.
- In terms differences in survey responses, age is not the most important variable; differences between different age cohorts are not significant. On the other hand, the reasons why people leave or come back to work in the field seem to vary by gender.
- Other professions are actively pursuing gender balance in education; the library community



- needs to take this into consideration as well.
- Strategies are needed to encourage younger librarians to take on management responsibilities.

ISSUES AND ACTIONS ARISING FROM THE 8Rs RESEARCH

President's Council Work

Wendy Newman

Senior Fellow, Faculty of Information Studies, University of Toronto

Ms. Newman gave an overview of the President's Council work and accomplishments to raise Associations and networks' awareness of the 8Rs report data and of its implications. To this end, summaries specific to sectors were distributed, presentations at conferences and LIS programs were made and journal articles were published. A web site highlighting the rewards of the profession through personal stories of people working in the field represents a key success, and will assist in recruitment into the profession. Work was accomplished in the area of foreign credentials, LIS education accessibility and leadership development for mid-career professionals.

Canadian Association of Research Libraries (CARL) Library Education Working Group

Vicki Williamson

Dean, University of Saskatchewan Library

Dr. Williamson presented the work of the CARL Library Education Working Group; this group was formed to foster on-going co-operation between the faculties of library and information studies and Canada's research libraries in areas of mutual interest. The final report to CARL board of directors was presented in May 2008; it includes 17 recommendations to advance research and education. A working paper on Survey of Canadian and International Data Management Initiatives was produced; and a product brief on national research competencies is being re-issued. This work represents a good example of taking the 8Rs research into action.

Library and Archives – *Bibliothèque et Archives (LAC-BAC)* Professional Identities and Competencies Research

Dr. Daniel J. Caron

Senior Assistant Deputy Minister, Corporate Management and Horizontal Integration
Library and Archives Canada / Bibliothèque et Archives Canada

Dr. Caron presented trends and challenges in the library and information management profession. With the evolution of the environment and in particular the arrival of the digital world, there is a need for the profession to evolve. Research revealed that various elements make up professional identity: the purpose of the profession, its culture (e.g. values, beliefs, attitudes, code of conduct, etc.) and the image (self perception and view from others). A stronger convergence between professional and collective identity is key to survival. Professionals working in libraries, archives, and museums share the purpose of building the collective memory and making it accessible; it's important to find ways to work together on common issues. The digital world is affecting how users access information and has an impact on the demand for services; understanding users' paradigm is important to forecast the future.



Questions and Answers

The following key messages emerged during the question and answer session:

- The 8Rs report includes a chapter on barriers to accessing LIS education.
- There is a need to rethink competencies in the digital world; understanding technological changes and their impact is important to reposition the profession.
- Work is being done with universities in terms of re-defining the identity of the profession.
- Being strategic and approaching issues in various ways will help address the challenges; this will require a focus on ongoing learning, conveying excitement about the profession to recruits and decision makers, and understanding users' evolving needs in order to better address them.
- Cross-fertilization between fields such as library studies, archives studies, museum studies are important, while respecting the differences between these areas.
- A study revealed that there is a commonality between libraries and museums is the high degree of trust in the information they present or hold; in addition, obtaining information from a museum (for example), often leads to use of a library for additional information.
- The concept of 'professors of practice,' where experienced employees also teach students, can help alleviate the challenge of finding professors to teach LIS programs.
- Cost, availability and distance of LIS education are not the only barriers; work-life balance (e.g. time, flexibility) also factor into the accessibility of education.

RESEARCH FINDINGS AND VARIOUS STRATEGIC MODELS

Recruitment

Wendy Newman

Senior Fellow, Faculty of Information Studies
University of Toronto

Ms. Newman described her investigation for the Canadian Council for Information Studies (CCIS) of ways in which the Canadian LIS programs might share courses and credits, focusing initially on online learning. She described the progress of partial online delivery in the graduate schools of library and information studies in Canada. Some are already members of WISE (Web-Based Information Science Education), an international consortium of 15 LIS programs intended as "a cost-effective, collaborative distance education program which would increase the quality, access and diversity of online educational opportunities available to LIS students". WISE has established "pillars" for online LIS education: quality, pedagogy, and collaboration. Both the 8rs study and Canadian participation in American online programs indicate growing demand for online LIS education in Canada. While the Canadian programs face some distinct challenges, they are interested in addressing them collaboratively. They are currently examining potential for shared online electives.

Leadership Development

Maureen Sullivan

Organization Development Consultant
Maureen Sullivan Associates

Ms. Sullivan offered leadership development strategies to Summit participants. The 8Rs research has identified the key elements of professional leadership program in LIS. The recommendations provide a framework to move forward to define competencies needed and the set of beliefs which would support their acquisition in a work setting. It's important to think of leadership as the capacity within individuals, and also as the capacity which exists in groups and organizations. The 8Rs



research presents a whole-system approach to address future needs and to rethink the roles and responsibilities of the profession. She concluded by asking Summit participants to express their leadership by considering what they can do to move this commitment forward.

Professional Development

Margaret Haines

University Librarian, Carleton University

Ms. Haines presented the framework for qualifications of the United Kingdom's Chartered Institute of Library and Information Professionals (CILIP). This qualifications framework considers professional knowledge, puts an emphasis on career-long professional development and recognizes different levels of achievement for both professionals and support staff. The focus is on a reflective portfolio and evidence-based practice. Four levels of certification exist: certification, membership, revalidation, and fellowship. An infrastructure is in place to support the program (e.g. mentoring network, courses, assessment panel, education and qualifications group, etc.). This model encourages continuous professional development at all levels in the profession, encourages individuals to take charge of their own development, provides the opportunity to experience leadership through a mentoring program and allows the recognition of work experience acquired.

Questions and Answers

The following key messages emerged during the question and answer session:

- Evidence of success of leadership development institutes should include elements such as evidence in improving the trainee's performance and an understanding of trainee's current strengths and abilities as well as their development needs.
- A variety of good leadership development resources exist: The Center for Creative Leadership (North Carolina); the Harvard Business Review publication; the Banff Centre, and various universities and other centres.
- Leadership training that provides the opportunity for trainees to be in contact with participants from other fields is useful to learn from other areas.
- Linkages between libraries and library schools are important in order to take a whole-system approach to transforming the profession and ensuring that leadership training is available.
- Some training programs include a requirement for employers to provide a leadership experience to program attendee within a certain time period after the program.
- The concept of being hired to work for an organization, rather than working to a job description represents a model that may assist new workers embrace the leadership challenge.
- In terms of professional certification requirements, individuals need to take the responsibility for lifelong learning, even if a certification or accreditation is not required by employers (e.g. CILIP).

PROMISING STRATEGIES

IDENTIFICATION OF PROMISING STRATEGIES

For this discussion, participants were grouped by the type of organizations they represented; the list of breakout groups is shown in Appendix C.



In break out groups, participants identified promising strategies to address the following three issues:

1. Ongoing professional development;
2. Filling expected shortages; and
3. Master of Library and Information Studies (MLIS) Education.

Participants considered the following questions for each of the three issues:

- From your perspective, how would you describe the current situation and challenges relating to this issue?
- What might be the high-level actions or big projects required to move forward with this issue/address some of the key challenges?
- Through discussion, identify the one or two most promising strategies – the ones that are feasible and that are most likely to be effective in addressing the key challenges and moving us forward.

The details of breakout group discussions can be found in Appendix D.

A number of potential strategies and examples of initiatives which would serve each strategy were identified and discussed in plenary.

The following themes emerged as areas of high priority:

- National internship program.
- Leadership development programs or institutes.
- Competencies-based approach (list of competencies, curriculum and training related to these competencies).
- Online or distance education program.
- National recruitment campaign.

The following themes also emerged during the discussion:

- Dialog between education providers, employers, students.
- IMLS funding body.
- A databank of national equivalency, which would also assist with foreign credentials.
- Marketing the benefits of professional development to employers.
- Model training policies.
- Program of exchange.
- Research fellowship programs.

DRAFT IMPLEMENTATION PLANS

The ideas generated during the discussion on promising strategies were summarized as a starting point for the next discussion. This summary can be found in Appendix E.

In break out groups, participants developed high level action plans to address the following themes:

- National continuing professional development framework, as tool that can be used by institutions and individuals.
- Filling anticipated shortages.
- Accessibility of MLIS education.



- National internship and mentorship program.
- Outcomes- and competencies-based leadership and/or management institute.
- Formal communication channels for employers-educator discussions.

The seven breakout group addressed different themes; the distribution of themes among breakout groups is shown in Appendix F.

In their breakout groups, participants considered the following questions for each theme:

- With respect to this strategy, what do we hope to have achieved by 2014?
- Identify the key actions required to implement the strategy and achieve the 2014 goals.
- Identify the key contributors or partners and their roles.

The details of breakout group discussions can be found in Appendix G.

National continuing professional development framework, as tool that can be used by institutions and individuals

A proposed plan was outlined to establish a bilingual framework of competencies for a Canadian context and create an engagement strategy with employers and employees to recognize the importance of ongoing learning. Refer to Appendix G, group G for the proposed implementation plan details.

The following key messages emerged during the question and answer session:

- This initiative would build on existing competency statements, competencies need to be updated to reflect changes in technology.
- The group envisioned creating competencies for various functions (i.e. not limited to professional librarians).
- Evidence of success would include the framework itself, and should be linked to learning plans, continuing education, education programs, etc.
- Additional potential contributors were suggested: e.g. Corporation des bibliothécaires professionnels du Québec (CBPQ), LAC-BAC, MLIS programs.

Filling anticipated shortages

A proposed plan was outlined to fill anticipated shortages through pro-active marketing and foreign credentials recognition. Promoting the profession as well as the high level of satisfaction it provides will help market the profession to various audiences. While the foreign credentials recognition issue cannot be solved in the short term, the CLA could play a role in starting to address this challenge. Refer to Appendix G, group A for the proposed implementation plan details.

The following key messages emerged during the question and answer session:

- Both technician and Master's programs were considered for the discussion on LIS education.
- The CLA Research Committee could perform some of the functions outlined in the proposed action plan.

Accessibility of MLIS education

A proposed plan was outlined to develop distance education MLIS programs. Developing a model, shared courses, as well as addressing diversity in recruitment were proposed. The importance of



understanding the accessibility challenges was highlighted. Refer to Appendix G, group D for the proposed implementation plan details.

The following key messages emerged during the question and answer session:

- Both recruitment and career progression are important to increase diversity in the profession; the term “diversity” was considered in its broadest sense for this discussion.
- A concern was expressed that imposing a residency component contributes to people looking to the U.S. for training.
- Employer engagement is important; all accredited programs currently must show evidence that they are engaging with employers on an ongoing basis as part of their American Library Association (ALA) accreditation process.
- Marketing the profession can have positive impact recruitment and enhance librarianship as a profession.

National internship and mentorship program

A proposed plan was outlined to develop and implement a national internship program, with a focus on new graduates as well as international graduates. The program would encourage diversity and would promote rotation through various functions to provide an overall experience of the profession. Mentorship would be a key component of the program. Refer to Appendix G, group E for the proposed implementation plan details.

The second group that addressed this theme presented a plan to create a task force to develop a national mentoring and internship program. Cooperative education programs, job shadowing, work exchange and mentorship could form part of the program. The task force would build on best practices models and on what other countries are doing in this area. Refer to Appendix G, group F for the proposed implementation plan details.

The following key messages emerged during the question and answer session:

- Funding would help support projects to work on particular issues and move forward.
- The existing internship program which is jointly managed by Heritage Canada and CLA is not well known (Young Canada Works program).
- The internship program should be broader and include library, archive and museum professions. Additional ways of tapping into this program could be pursued.

Outcomes-based and competencies-based leadership and/or management institute

A proposed plan was outlined to identify a provider and to develop a bilingual competency-based leadership program. Personal, managerial and senior leadership represent three key elements of the program which would include experiential learning elements. Reviewing existing leadership programs to create an inventory represents a short-term solution to move this forward. The group recognized that developing a leadership culture starts early and must be reflected in course curricula. Refer to Appendix G, group C for the proposed implementation plan details.

The second group that addressed this theme presented a plan to research what stakeholders and communities identify as key leadership competencies and develop leadership models and programs; the establishment of a bilingual leadership institute was presented as shorter term solution. The program would result in the development of a culture of leadership and the availability of a strong pool of qualified candidates to meet the needs of employers. Refer to Appendix G, group B for the proposed implementation plan details.



The following key messages emerged during the question and answer session:

- Volunteering for various associations represents an opportunity for professional development that should not be underestimated.
- There is a sense of urgency in developing management and leadership skills, an inventory of existing programs would be useful in the short term (Northern Exposure to Leadership being one).
- LAC-BAC was proposed to lead a national steering committee to research what stakeholders identify as key leadership competencies, as they are already active in this area.

Formal communication channels for employers-educator discussions

A proposed plan was outlined to develop communication channels between employers and educators. This group recognized that mechanisms already exist and that improving cross-fertilization and effectiveness would be beneficial; the composition of advisory committees may need to be more diverse to ensure effective communication. It was noted that in addition to organizations, there is an individual responsibility that each one can take in this area. Refer to Appendix G, group B for the proposed implementation plan details.

There were no questions following this presentation.

MAINTAINING MOMENTUM

TRACKING THE CHANGING HUMAN RESOURCES ENVIRONMENT FOR PLANNING PURPOSES

Ernie Ingles

Mr. Ingles presented what the 8Rs research and data had accomplished to date and described the current situation related to the aging of the data. There is a need for evidence based information to make decisions and to design effective solutions. Summit participants' support will be needed to take action. It was proposed to conduct a longitudinal study, and to survey individuals and institutions to assess the variables which are the most likely to shift and to clearly identify trends.

The following key messages emerged during the question and answer session:

- This work is important and needs to be supported.
- U.S. and Canadian studies provide complementary information.
- Participation of other sectors and the inclusion of special libraries would be useful.
- The first step consists of determining the needs and developing the survey methodology; this will determine budget and funding requirements.

HOW TO MOVE FORWARD IN A COLLABORATIVE WAY

Ken Roberts

Mr. Roberts outlined the proposed next steps to move forward. The Summit proceedings will be prepared and distributed. There is a need for the work being undertaken to be well coordinated and to meet the needs of the community. To this end, the current steering committee which has representation from all sectors could become a coordinating body to oversee the initiatives being developed; the composition of the committee may need to be reviewed in light of this new role. CLA was proposed as the lead organization which would track the initiatives' progress.

Participants spent a few minutes at their table discussing their ideas to move forward. The following key messages emerged during the plenary discussion that followed:

- It will be important for the coordinating group to communicate with associations, to inform them of activities and progress, as well as to seek feedback and input; someone could be identified to play this role.
- A web site with wiki capabilities would be a useful way to enhance open communications.
- It would be worthwhile naming or branding the initiative, so that it can be referred to “in one word”.
- Other groups may be interested in playing a role (e.g. employers, people who may be interested in coming back to the profession, employees, users, unions, etc.).
- In the draft implementation plans which were proposed today, there seems to be natural delineations of roles each of the group could play (e.g. CARL, CULC, etc.) on the various initiatives.
- Summit participants have a responsibility to be ambassadors of what has been discussed here; collaborating on articles to promote this work could help maintain the momentum.
- Various stakeholders may have different perspectives; hence, keeping an open mind and questioning assumptions is important to understand the environment.
- Additional work is required to refine the proposed action plans and to determine what can or should be done first. There is a clear link between competencies and education, and the leadership piece is very important.

CLOSING REMARKS AND NEXT STEPS

Ken Roberts

Mr. Roberts reaffirmed CLA’s commitment to move forward. The Human Resources Summit Steering Committee will identify next steps and will coordinate the groups who want to be involved in the initiatives undertaken. There are upcoming conferences at which this could be presented, in order to generate interest and momentum. Summit participants and associations will play a key role in moving this forward, through their input and participation in these initiatives. In closing, Mr. Roberts thanked Summit participants for sharing their time and expertise during the two-day event. He also thanked the facilitators, note takers, and meeting organizers for a successful Summit.

**CANADIAN LIBRARY ASSOCIATION
NATIONAL SUMMIT ON LIBRARY HUMAN RESOURCES
OCTOBER 6-7, 2008
MARRIOTT HOTEL, 100 KENT, OTTAWA, ONTARIO**

AGENDA

OUTCOME

To identify the strategies and key actions required over the next 5-6 years to move towards the goal of ensuring an adequate supply of well-educated, well-trained librarians and information professionals to meet Canada's knowledge and information management needs in the first three decades of the 21st century.

OBJECTIVES

- To identify promising strategies that will help address the current and future human resource issues;
- To identify the actions that participants and stakeholders will undertake to implement the strategies over the next 5-6 years;
- To determine how the library community can move forward in a coordinated and collaborative way.

DAY 1

A. GETTING STARTED

8h00	'	Arrival / Coffee	
8h30	'	Welcome and Purpose of the Summit	Alvin Schrader
8h40	'	Review of Agenda and Approach	Kathleen Connelly and Julie Fillion, Intersol Group

B. OUR CONTEXT AND ISSUES

8h50	'	The Current and Future Picture of Human Resources in the US and Canadian Library Communities <ul style="list-style-type: none">▪ Situation in the US	Joanne Gard Marshall / Don King
		Question and Answer Session and Plenary Discussion: <i>How does the picture in the US compare with the Canadian picture?</i>	

9h50	‘	<p>Issues and Actions Arising from the 8Rs Research</p> <ul style="list-style-type: none"> ▪ President’s Council work ▪ CARL Library Education Working Group ▪ LAC-BAC PACS research <p>Question and Answer Session</p> <p>(Health Break Included)</p>	<p>Wendy Newman Dr. Vicki Williamson Dr. Daniel J. Caron</p>
11h30	‘	<p>Research Findings and Various Strategic Models</p> <p>Question and Answer Session</p>	<p>Wendy Newman Margaret Haines</p>
12h30	‘	<p>Lunch (served in restaurant)</p>	
1h30	‘	<p>Research Findings and Various Strategic Models (continued)</p> <p>Question and Answer Session</p>	<p>Maureen Sullivan</p>

C. STRATEGIES FOR THE NEXT 5-6 YEARS THAT INSTITUTIONS/ASSOCIATIONS WILL SUPPORT

2h00	‘	<p>Identification of promising strategies – Group Work</p> <p>(Health Break Included)</p>	<p>7 Break out groups (by type of organization) identity 1-2 strategies for each of the 3 issues</p>
3h45	‘	<p>Identification of promising strategies (cont’d)</p> <ul style="list-style-type: none"> ▪ Share results in plenary ▪ Identify areas of convergence 	
5h10	‘	<p>Review agenda for next day</p>	
5h15	‘	<p>Close</p>	

DAY 2

D. IMPLEMENTING THE STRATEGIES

- 8h00 ‘ Arrival / Coffee
- 8h30 ‘ Review of the agenda
- 8h40 ‘ Implementing the strategies Break out groups
For each of the strategies:
▪ Identification of desired outcomes by 2014
▪ Identification of key actions to achieve the desired outcomes
▪ Identification of potential contributors and their roles
- 10h45 ‘ Health Break
- 11h00 ‘ Plenary reports on Implementing the Strategies
▪ Feedback from other participants
- 12h30 ‘ Lunch
- 1h30 ‘ Tracking the changing human resources environment Ernie Ingles
for planning purposes
▪ Presentation
▪ Question and Answer Session/Gauging support from the community
- 2h15 ‘ Health Break

E. MAINTAINING MOMENTUM

- 2h30 ‘ How to move forward in a coordinated and collaborative way
▪ Associations' present their ideas
▪ Group Discussion
- 3h30 ‘ Closing remarks and next steps Ken Roberts
- 3h40 ‘ Evaluation and close

APPENDIX B – PARTICIPANTS LIST

Name	Company
Karen G. Adams	University of Manitoba Libraries
Paul Banfield	Association of Canadian Archivists
Jeff Barber	Regina Public Library
Gerald Beasley	Concordia University Libraries
Richard F. Beaudry	Langley School District #35
Shailoo Bedi	University of Victoria
Catherine Biss	Markham Public Library
Pam Bjornson	CISTI/Canada Institute for Scientific & Technical Information
Fiona A. Black	Dalhousie University
France Bouthillier	McGill University, School of Information Studies
Sharon M. Brown	Wilfrid Laurier University
Steven Burdick	Canadian Union of Public Employees
Patricia Burt	Red River College
Lorraine A. Busby	Memorial University of Newfoundland Queen Elizabeth II Library
Sharon Campbell	Ottawa Public Library
Thomas Carmichael	University of Western Ontario
S. Leanne Clendening	Ontario Library Services North
Susan E. Cleye	Memorial University of Newfoundland Queen Elizabeth II Library
Barbara H. Clubb	Ottawa Public Library
Joanne Griener	Edmonton Public Library
Lynn Copeland	Simon Fraser University
Leonora L. Crema	University of British Columbia Library
William M. Curran	Concordia University
Ann Curry	University of Alberta Libraries
Deborah A. Defoe	Kingston Frontenac Public Library
Monique E. Desormeaux	Ottawa Public Library
Gwendolyn Ebbett	University of Windsor
Jennifer Evans	Nova Scotia Provincial Library
Leslie Firth	Carleton University Library
Shelagh Flaherty	Vancouver Public Library
Pamela Forsyth	St. Albert Public Library
Rosalie Fox	Supreme Court of Canada
Barbara Franchetto	Southern Ontario Library Service
Andre Gagnon	Regina Public Library/Working Together Project
Joyce Garnett	University of Western Ontario
Margaret Grove	Brock University
Dolores T. Harms Penner	Mohawk College
Ken Haycock	San Jose – SLIS
Ian J. Heckford	Oshawa Public Library
Barbara B. Herd	Ottawa Public Library
Thomas Hickerson	University of Calgary
Carol Hixson	University of Regina Dr. J. Archer Library
Francesca Holyoke	Canadian Association of University Teachers
Jane Horrocks	Richmond Hill Public Library

Name	Company
Ernie Ingles	University of Alberta Libraries
Christine M. Jacobs	John Abbott College, Information and Library Technologies Department
Lynne Jordon	British Columbia Library Association
Carole Julien	Library and Archives Canada
My-tu Kaan	Human Resources and Skills Development Canada
Dan Keon	Toronto Public Library
Dianne Kharouba	University of Ottawa
Adele Kostiak	Brampton Public Library
Gina La Force	Thunder Bay Public Library
Carole J. Lague	Ville de Gatineau
Sharon J. Lamont	University of Waterloo Library
Pierrette Landry	Library of Parliament
Leslie Latta-Guthrie	Canadian Council of Archives
Madeleine Lefebvre	Ryerson University Library
Joan Leishman	University of Toronto
Vivian Lewis	Anne Pottier
Margaret E. Macdonald	Chinook Arch Regional Library
William R. Maes	Dalhousie University
Jen-Erik Mai	University of Toronto, Faculty of Information
Mary Ann Mavrinc	University of Toronto at Mississauga Erindale College Library
Mary E. McConnell	University of Calgary, Information Resources
Julie McKenna	Multitype Library Board and Regina Public Library
Gerry Meek	Calgary Public Library
Todd M. Mundle	Simon Fraser University W.A.C. Bennett Library
Alison M. Nussbaumer	University of Lethbridge Library
Robert K. O'Brennan	Fraser Valley Regional Library
Fabio Onesi	Library and Archives Canada, Government Records Branch
Ingrid Parent	Library and Archives Canada
Mike Parkinson	Southern Alberta Institute of Technology
Shelagh Paterson	Ontario Library Association
Amy Rankin	Saskatchewan Library Association
Eddie Rassmussen	University of British Columbia School of Library, Archival & Information Studies
Brent C. Roe	Canadian Association of Research Libraries
Rachel Sarjeant-Jenkins	Medicine Hat Library
Janine Schmidt	McGill University Library McLennan Library Building
Catherine Steeves	University of Guelph
Robyn Stockand	National Bank Financial
John D. Teskey	University of New Brunswick Harriet Irving Library
Peggy L. Thomas	Ontario Library Association
Keith D. Walker	Medicine Hat College Library
Leslie Weir	University of Ottawa
Vicki Whitmell	Ontario Legislative Library
Paul Wiens	Queen's University Douglas Library Serials
Allan Wilson	Prince George Public Library

Name	Company
SPEAKERS	
Vicki Williamson	University of Saskatchewan Library
Maureen Sullivan	Maureen Sullivan Associates
Alvin M. Schrader	University of Alberta, School of Library and Information Studies
Ken Roberts	Hamilton Public Library
Wendy Newman	University of Toronto, Faculty of Information Studies
Joanne G. Marshall	School of Library and Information Studies, University of North Carolina
Donald W. King	University of North Carolina at Chapel Hill
Margaret P. Haines	Carleton University
Daniel J. Caron	Library and Archives Canada
SUMMIT STEERING COMMITTEE	
Fay Hjartarson	Library and Archives Canada
Hélène Carrier	University of Ottawa
Kathleen M. Delong	University of Alberta Libraries
Allison Sivak	University of Alberta Libraries
INTERSOL GROUP	
Kathleen Connelly	
Julie Fillion	
NOTE-TAKERS / BLOGGERS	
Diego Argaez	CARL
Jess Posgate	Grey Highlands Public Library
Katrine M Mallan	Citizenship and Immigration Canada
Amber Lannon	McGill University Libraries
Liz Hayden	University of Ottawa Libraries
Jason S. Hammond	Regina Public Library
Steven Chabot	
CANADIAN LIBRARY ASSOCIATION STAFF	
Kelly Moore	Executive Director
Wendy Walton	Conference & Professional Development Officer
Carla Chami	Administrative Support Assistant

APPENDIX C – BREAKOUT GROUPS

Participants were assigned to breakout groups based on the type of organization they represented; the following groups were formed:

GROUP	FACILITATOR	NOTE-TAKER
A – Associations	Ernie Ingles	Diego Argaez
B – Canadian Association of Research Libraries (CARL)	Hélène Carrier	Liz Hayden
C – Canadian Association of Research Libraries (CARL)	Kathleen De Long	Katrine Mallan
D – Canadian Council for Information Studies (CCIS)	Fiona Black	Steven Chabot
E – Canadian Urban Libraries Council (CULC)	Adele Kostiak	Amber Bannon
F – Canadian Urban Libraries Council (CULC)	Fay Hjartarson	Jason Hammond
G – Other Public Libraries	Alvin Schrader	Jess Posgate

GROUP A

Identification of Promising Strategies

Day 1

Facilitator: Ernie Ingles **Note taker:** Diego Arguez

Issue 1 – Ongoing Professional Development

1. The current situation/ key challenges:

- Continuing education ; great potential
- Not enough sharing of all the offering at hand – curricula and learning products
- The Partnership ; an instance of cross-sectoral sharing
- Some people have a portfolio – esp. if they are a “one person show” – as opposed to job description
- The Partnership is an Association of Associations; “on the ground providing resources to librarians and library technicians” – e.g. The Education Institute (OLA a pivotal partner); big online component; online, peer-reviewed Open Access journal
- The Partnership – always looking to collaborate to offer specifically tailored online CPD opportunities – e.g. for the Health Information sector
- The information profession is extremely diverse
- Competencies can be specific, specialized to certain communities of practice
- General introductions vs. high level treatment of an issue/topic
- Once you leave the doors of your University, you don’t get the benefit of the structure of your MLIS program; Practicing librarians can be reluctant to re-register for another course, or semester of courses
- CPD opportunities: Conference; the Partnership; vendor offerings on the product line; Summer institutes for a number of weeks; Northern Exposure to Leadership Institute; Local interest groups – e.g. Institutes for school librarians; Short, intense courses with small enrollment – part of conferences with an additional fee
- Finding the time; getting the time; getting the support \$; flexibility and leave provisioning lacking sometimes
- Education handled at the provincial level more than the federal – Certificates offered in various provinces to upgrade archival skills for instance
- Coordination another challenge
- Where’s the carrot to make professionals seek CPD? Answer: “it makes you better at what you do.”
- Not just a matter of the employer suggesting CPD rather it’s ideally a matter of self-direction
- Leadership training for archivists in Canada currently lacking
- Breaking down disciplinary barriers
- Cumulative list of information professional competencies – no current list academic librarians could point to
- Employer engagement

- Personal engagement
- Recognition for CPD activities
- Voluntary nature of CPD, can be a challenge to get inserted into union/collective agreement scenarios

2. Potential strategies:

- CILIP model, and Australian model
- Continuing education certification committee developed by The Partnership; self-directed portfolio creation
- Formalize recognition of CPD, and portfolio creation
- Think big, picture, innovation; creativity; collaboration
- develop soft skill sets
- Cater to a breadth of educational/professional backgrounds

3. Most promising strategies:

- Canadian CILIP type of certification
- Mentorship program (clearing house of seasoned professionals) that's easily and cost-effectively accessed – "I'm willing to be consulted by new professionals on N matters, and here's how they can reach me"; this strategy could help close the gap between schooling and working in the field; mentorship can help succession planning as well
- Summer internship program – e.g. Mid- MLIS between 1st and 2nd year; or post MLIS internships for new graduates; Institutional and sectoral approaches recommended (even broadly writ to include u-grads and high school students – attract people to the field early)

Issue 2 – Filling Expected Shortages

1. The current situation/ key challenges:

- Professionals' willingness or reluctance to relocate
- Flexibility – face to face vs. distance, online education
- Supply and demand; is there a lesson to be learned from what the Nursing profession did to address the labour shortage? e.g. – revamped curriculum, increased salaries, etc. Does the Library community want to hire more librarians, more library technicians?
- 90% librarian satisfaction rate with job shown by research; what can be drawn from that research to retool recruitment strategies
- Duties performed in both digital and physical environments

2. Potential strategies:

- Complete audit of Canadian libraries; Statistics Canada Survey

3. Most promising strategies:

- Rethinking MLIS curricula/ realign it with the field
- National list of core competencies
- Collect and maintain more sophisticated data

Key considerations:

- Do we want people to move up the ranks, purely from an experiential point of view, or is there an appropriate educational training program to produce administrators and leaders?
- Where are we going to reposition librarians in the changing workforce dynamic?

Issue 3 – MLIS Education**1. The current situation/ key challenges:**

- Limited number of places in MLIS programs
- MB and SK without library schools
- Access to accredited library education
- The skills are the issue as opposed to the numbers
- Disconnect between LIS curriculum and the positions that libraries are creating and looking to fill; getting the right candidates to fill vacancies and new posts to take the libraries in new directions another challenge
- Universities last bastions of stand-and-deliver education
- Students often shy away from management

2. Potential strategies:

- Core competencies profile/list
- Attract web 2.0 savvy students
- Emphasize administration and the leading of others in LIS education
- Cross-fertilization with MBA programs
- Front end streaming approach for LIS education (while covering the fundamentals at the same time)

3. Most promising strategies:

- Rethinking MLIS curricula/ realign it with the field
- National list of core competencies
- Collect and maintain more sophisticated data

Key considerations:

- Many students, come to library school not thinking about management as a goal, however, they do expect to acquire more responsibilities and even get a taste of management/leadership
- Some LIS students would like to go forward, doing greater skills but not necessarily management rather increased specialization and knowledge, later not recognized as management in terms of recognition and remuneration

GROUP B

Identification of Promising Strategies

Day 1

Facilitator: H el ene Carrier

Note taker: Liz Hayden

Issue 1 – Ongoing Professional Development

1. The current situation/ key challenges

- taking responsibility for own professional development
- need a culture of “own responsibility” like in the UK
- ensuring that the learning is integrated to work (avoid the learn something and never use it scenario)
- matching the institution’s needs to the individual’s wants
- everyone has a perception about the need for training
- the cost of training can be beyond budget
- distribution of library schools (location)
- the one-size-fits-all model does not work
- professional development does not mean just courses, could be volunteering or sitting on the school board, etc...within or outside of the domain as long as you are demonstrating skills required to be an information professional
- there is no set standard of professional development for librarians
- fighting the attitude of “I don’t need or have time for training”
- we need to understand each other, librarian and archive professionals and information professionals
- do employers see/recognize the payback or value
- recognizing that there are different learning styles

2. Potential strategies:

- made in Canada solution of leadership training
- mentoring & internships programs, nationwide *key=train the mentors
- exchanges, inside and outside the profession
- introduce a culture shift about professional development
- getting people to care about personal growth

3. Most promising strategies:

- Formal nationwide mentoring & internships programs, including training for the mentors

Key Considerations

- There was discussion about how important the task of training the mentors would look like. We cannot create a mentorship program without having a good and well-trained base of mentors available.
- The level of importance of a Canadian solution was discussed in some detail. The final

viewpoint was that a Canadian perspective is very important.

Issue 2 – Filling Expected Shortages

1. The current situation/ key challenges

- define the shortage= mid and upper level professionals
- hard to find the right people
- the right people don't apply because they don't understand the job roles (they sound dull)
- Note: the mentoring and internship programs could help
- special libraries issues
- the job model... "lifers" or "it's my turn to have that job"
- who mentors the managers?
- disconnect between the traditional roles and the real/actual needs (e.g. in cataloguing today)
- diversity (try having scholarships)
- there is a gap between the young level coming in and the upper level of librarians (because positions weren't filled in the 90s), middle level of recruits is missing
- we don't offer a lot of incentive to move up the mid or upper levels -usually only a little more money for more work, more decision making, supervision

2. Potential strategies:

- rewards and incentives
 - especially for the "right people"
 - not just cash, good professional development opportunities, etc
- national diversity program
 - recruit students into MLIS programs and groom from there
 - management AND librarianship need to be marketed together
 - grow new staff internally
 - evaluate foreign degrees

3. Most promising strategies:

- national mentor program
- targeted recruiting to profession
 - national campaign
 - diverse workforce

Key Considerations

- The first group discussion element (on-going professional development) was noted as an important element for this section. A solid CPD program will show potential candidates that there is support for them.
- Defining the real shortage did not take long. Everyone agreed that the biggest gap exists in the area of middle management

Issue 3 – MLIS Education

1. The current situation/ key challenges

- distance education, with Canadian focus
- who will teach? consider professors of practice
- marketing (web sites) -make it appealing, most are very dull and don't inspire people to want to do the degree
- how can we influence from within?
- Practitioner-in-residence
- schools need to cooperate and work together
- MLIS -is it academic or professional?
- host a campus
- prospective employers (librarians) should have a say in selecting MLIS students

2. Potential strategies:

- Canadian-made distance education program

3. Most promising strategies:

- Canadian made-distance education program
 - offer CARL support
 - consider professors of practice
 - practitioner in residence

GROUP C

Identification of Promising Strategies

Day 1

Facilitator: Kathleen DeLong, Wendy Newman

Note taker: Katrine Mallan

Issue 1 – Ongoing Professional Development

1. The current situation/ key challenges:

- Current challenge - align Professional Development and individual needs to current and future organizational needs
 - There are too many competing certifications / competency frameworks?
 - Currently there are few incentives to the individual to develop their professional competencies. What is the payoff, reward for ongoing PD to the individual?
 - This may lead to self censure – it's not obvious that there will be a benefit to all the hard work
- Library staff often lacks the time to focus on professional development. Their responsibility to the organization is the work they do (and not training or development) and this takes up 110% of their time. Is this message received from the parent organization?
 - Collective agreements focus on the individual's needs. There needs to be more convergence between individual and collective/organizational needs regarding professional development
 - Regarding professional development - there are too many players, no real plans - coordinate what already exists
- It is important to differentiate between professional development (management, leadership skills) and library expertise. Do we need to look outside for ideas on PD and training - not just LIS-based, home-grown solutions to training.
 - Upon return from professional development or training, nothing at the home organization encourages the individual to implement what was learned, resulting in little ROI from training/PD
 - Institution offered Professional Development is often "skill-based" i.e. how to use excel
 - Leadership is narrowly defined/conceived to a management function - individuals don't see themselves in this sense - need to broaden the definition of Leadership to be more expansive to include more people, and engage more librarians.
 - Does ALA have a role to play in modifying the accreditation guidelines/process to reflect the current environment
 - Identify how a wide variety of competencies are part of LIS
 - Aligning Personal and institutional responsibilities regarding professional development
 - Content question - what kinds of competencies are we talking about? Aiming for? Are competencies a moving target?

2. Potential strategies:

- CREPUQ initiative - newer professionals - 3-4 years ago began a focused program on identifying management skills to engage potential managers - will participants be interested in managing after the program? most are interested after the program. (2 day program on 7 "blocks" - i.e. conflict resolution, strategic planning, human resources, etc.). 100+

- participants. Focused on emerging librarians.
- COPPUL initiative - capacity building - grow your own management and leadership "in shop". First step - demand, interest, how much time they can commit. Developing a survey to collect this information. What librarians and archivists think they are missing from professional development? This is aimed at midlevel/career librarians.
 - BLUE RIBBON panel - forward thinking - round table - this model can be used within an institution or across institutions
 - Records Management - LAC introduces library issues to gov't - has the attention of the PM, Clerk of the Privy Council - take the discussion to the top. Propose the change before a change is imposed.
 - Identifying cohorts of professionals interested in management and leadership positions could be promising. But there could be a perception of "tailoring" people for future positions – the fairness issue.
 - Two issues, 1) keeping up to date 2) leadership and management training
 - What about the old MBA?
 - Importance of looking outside, in business schools, other sectors.
 - CARL should spend some time looking at competencies of a competent qualified professional.
 - Get out and talk to constituents to find out what they need in order to outline professional competencies
 - Initiatives need to have impact. High level is important, but we also need concrete steps.
 - Partner with ARL to offer workshops
 - Link competencies with student engagement standards to draw the dots for the university provosts "NSSE"

3. Most promising strategies:

- Blue Ribbon Panel

Issue 2 – Filling Expected Shortages

1. The current situation/ key challenges:

- We don't know when staff will retire, could be sudden, could "never" happen (!)
- Huge issue - transferring staff around, changing roles of staff - a workforce planning issue - how to create the positions that reflect the competencies
- Organizational culture, collective agreements, everyone has employment security
- We have to recruit people based on an image that reflects the reality
- Faculty status - doesn't seem to encourage a growth of knowledge - seems sometimes to preserve the status quo
- Seniority still seems to count far more than learning

2. Potential strategies:

- Awareness program for student library workers about career potentials in librarianship, i.e. science, geography, engineering students - to see the library beyond shelving the books - do job-shadowing with librarians, expose them to the profession at a younger age, and it might attract students from a more diverse educational background, i.e. Arts.
 - Start with the high schools - expose LIS as a career
 - Links on library websites to "library career"

- The LIS schools should go "out" to recruit potential subject specialists - medical, law, engineers, GIS, math, management, etc. - maybe we can help them with that. Get out to professional groups.
- Outreach to other professional groups
- Longer term exchange programs between institutions - both institutions could gain additional knowledge and experience
- Take a promising recruit and train them "up", i.e. send them away to a larger institution to "apprentice" with an experienced librarian, in systems, for example

3. Most promising strategies:

- National student engagement program, strengthen awareness of the profession to non-traditional student populations
 - LIS schools to recruit in more diverse undergraduate programs
 - Exchange programs, apprentice programs between institutions

Issue 3 – MLIS Education

1. The current situation/ key challenges:

- LIS Schools recruitment - where/who are they recruiting
- Lack of combined degrees, blended opportunities
- Is it a degree to be proud of? Is this because it is a "professional" program. Focuses on the "how", instead of the "why". No corpus of knowledge.
- Is this because LIS is a semi-profession, not a profession? This is an uncomfortable topic. We don't have an accrediting body.
- What are the criteria for getting into library school? LIS schools could learn from other professional faculties
- Criteria would have to map to the competency outcomes.
- Do the graduates we are getting have the competencies that we need?

2. Potential strategies:

- Advisory councils - Collaborate with LIS schools on enhancing admissions criteria, course content, competency developments, delivery of LIS program
- Develop a strong distance education LIS program - coordinate a national distance LIS program (learning from Athabasca U. or American online program models?)
- Professors of practice - what do they bring to the LIS programs - help ensure that LIS students understand the profession
- Blended programs, joint MLS MBA or Engineering

Most promising strategies:

- Online distance delivery program - look to neutral institutions for like Athabasca to deliver an online master's program - LIS schools provide the content
 - Employer - LIS Schools relationship
 - Blended program. LIS/LLB, LIS/MBA, LIS/Health

GROUP D

Identification of Promising Strategies – Education Working Group

Day 1

Facilitator: Fiona Black

Note taker: Steven Chabot

Issue 1 – Continuing Professional Development

1. The current situation/key challenges:

- National/Provincial responsibility for funding: National issue, yet education is provincially funded. Day students vs. distance funding. Applies both to students and CPD. Funding for CPD is low in institutions. Willingness of employers to allow ½-1 day off for PD. National/Provincial/Institution issues. One size will not fit all. We do have Education Institute, which is a positive.
- Professionals seek opportunities for refreshing one's skills in areas of great change i.e. example of cataloguing. Difficult to get classes at university level for CPD. Many do not want to do online, want face-to-face.
- Continuing education for limited skill improvement (and whose responsibility, MLIS or library technician institutions?) vs. professionals as part-time students in degree programs.
- Need for individual initiative, where may not be promoted by their institution. Cannot assume that it is automatic for everyone. Marketing need for CPD is important, to show benefit of CPD and celebrate people's efforts. Need to have it make a difference to professional's salary: recognition and reward. At teaching level, how do we justify resources for CPD courses? How do we justify having employers pay for time off?
- Dichotomy between association classes and schools offering degrees/diplomas. Schools don't see point of offering things which take money out of their pocket, and in research institutions CPD not seen as "education". Is CPD motivation on side of individual or organization or schools? Rapprochement needed.

2. Potential strategies:

- Higher Education needs to rethink what is valued.
- Campaign directed at employers showing value of CPD. It is not that librarians don't value it, but funding comes from upstream. Research-based HR to show organizational benefits of strong professional development.
- Recognized standard framework.
- Integrate CPD into standard higher education programs.
- Large funding sources akin to Institute of Museum and Library Services (U.S.).
- Partnering Associations/Tech programs/LIS programs.
- CULC/CARL need to think what is the role of continuing professional education in their institutions.
- "Best employers" list related to CPD.
- Consider licensing: increases status of profession. However, much less flexible. Licensing of librarians in Ontario not supported by employers and profession. Commitment might not be there. Yet, gives alternate educational route ala CILIP. What is true for health sector (restricting practitioners) may not apply to our field.

3. Most promising strategies:

- Get funding sources. IMLS and WISE models suggested, but costs high.
- Change attitudes and the reward structure in workplace. Need to demonstrate demand for PD courses. Employers must recognize value of CPD.

Key Considerations

- Major disagreements around issue of licensing. While it increases status of profession, some suggested that it had been done in the past without major success, while others suggested it as alternate route for advancement.

Issue 3 – Inaccessibility of MLIS Education – expanded to Library Tech education as well.

1. The current situation/key challenges:

- What is accessibility? Geographically, financially, intellectually etc. What is the problem? We want empirical data to prove lack of representation. We all have more applicants than positions. Perhaps this is an issue for the future i.e. retirements. This applies to every profession however. In the future, will vacancies in other professions take away our current surplus of applications for Tech/MLS?
- Visible minorities and Aboriginals? What evidence is there that programs are less accessible to minorities vs. white students? No, this is a representation/recruitment issue, not access. Yet, schools cannot officially recruit based on ethnicity because of privacy legislation.
- Is it just as easy as increasing the number of students admitted? Can use web-based programs to create those spaces. Butt up against funding model: master's programs not funded on per-student basis.
- Superb tech students with poor GPA vs. excellent GPA Master's who do poor quality work. Yet, GPA is only one factor. Age is important: gained low GPA at 21, now applying at 35. Fast track based on professional experience in both nurses and teachers. Maybe we are not desperate enough for this.
- Is the Summit asking us to create distance programs? Is it possible: budget model of university/province does not make this possible. It is possible to create this quickly if we have the funding. Some suggest we can create such programs quickly, based on current course offerings
- If there is simply a labour shortage, then there are easier and less costly ways to solve it i.e., increase enrollment.
- Lack of qualified faculty is more of an issue than lack of students.
- Distance programs are available throughout the US and UK. Do we need a Canadian program? What are the advantages? Distance Education is only a delivery method, not a panacea.
- Special case of Quebec Dept. of Ed and MLIS distance education for rural areas and international francophones.

2. Potential strategies:

- Flexibility in admissions criteria.
- Look at DE outcomes in Lib. Tech education: how has it helped.
- We do not agree how this issue is framed.

3. Most promising strategies:

- We did not agree how this issue is framed for our discussion. Felt it was directed towards distance education, and while issue of accessibility, if valid, was much broader. No consensus.

Key Considerations

- All participants felt that there needs to be more data on the question of accessibility, and felt the issue has not been examined in sufficient depth in order to suggest solutions. Apart from rural students, no agreement that this area is an issue.

Issue 4 – Trends and Challenges of Metrics

1. The current situation/ key challenges:

- Reframe as a research problem so we can contribute to and/or relate to trends and metrics in our own students and/or CARL/CULC data. Tracking alumni necessary for re-accreditation, but often only happens at that time.
- Higher education needs a tracking method that is standard and facilitates comparison.
- Poor job of workforce planning. By the time we realize there is a shortage it is too late.
- Data collection efforts do exist, we shouldn't repeat work. In Ontario librarians have academic status are tracked amongst those numbers. In terms of academic librarians retirement data 8Rs is not obsolete but very relevant.
- What we do not have is data showing impact of retirements on the structure of organizations. We are told to train more librarians, but will the situation be the same in 10 or 15 years? For instance, how many libraries still need cataloguers? We still focus on librarians, but don't look at entire library staff in the big picture. How have things shifted, and how should our educational components change?

2. Potential strategies:

- Better and more formal means of communication between CCIS and employers about what is needed in education e.g. shared formal tracking of job posting to facilitate program evaluation
- Encouragement for more research. Need ongoing body of research around workforce needs.
- MLIS grads can work anywhere. Library organizations need to recruit actively.

3. Most promising strategies:

- Better and more formal means of communication between CCIS and employers about what is needed in education.

Key Considerations

- Participants feel that more research and data is needed concerning the future outlook concerning retirements in libraries. Feel that data such as 8Rs assume that current trends in libraries will continue unchanged into the future. We should not assume that every retiring librarian will be replaced in a one-to-one fashion.

GROUP E

Identification of Promising Strategies

Day 1

Facilitator: Adele Kostiak

Note taker: Amber Lannon

Issue 1 – Ongoing Professional Development

1. The current situation/ key challenges:

- Not enough budget for PD
- PD is undertaken on top of current roles, not enough time
- Apathy (or even simply balancing work life challenges) for PD
- Staff doesn't feel personally responsible for PD and not responsible to train others when they come back
- No or little reward for PD
- Can't use what was learned because of the culture of the organization
- Not enough staff to release people to do PD
- Finding PD inspiration as we progress through our careers

2. Potential strategies:

- Brown Bag lunches
- Broader database of conference reports
- Blogs as a tool
- Reallocate \$\$ from elsewhere (i.e. Monograph budget)
- Shared development of modules between organizations
- Focus on new employees, make it mandatory and part of performance review
- Use the wisdom and experience of senior staff to develop new staff
- Job shadowing and mentoring (cross Canada)
- Reward systems for PD
- National internship program
- National sharing of PD

3. Most promising strategies:

- National internship and sharing of PD between organizations
- National development of PD modules and programs
- The development of a national mentoring program

Issue 2 – Filling Expected Shortages

1. The current situation/key challenges:

- Aging workforce
- Leadership skills are leaving, managers are leaving, corporate history is leaving our organizations
- Special libraries and academic libraries emphasized in LIS (difficult to recruit to Public)
- The profession doesn't do very good job of recruiting (nobody knows what we do)
- Limited pool going into library school

- Need retention strategies for those that do
- Diversity is not possible, no representation
- Not enough use of library technicians
- Little ability to move people around the system
- Librarians hold onto some tasks that could be done by technicians because they feel its professional work (i.e. collections)
- Staff who are not performing or won't undertake ongoing PD create shortages because they don't work to capacity

2. Potential strategies:

- Internship program
- Co-op programs
- Bursary programs
- Hiring for the system not the branch

Increase Jjg strategies:

- Internship and co-op program

Key considerations:

- It's not always about age. How do we move people who don't continue their skill development, both young and old?

Issue 3 – Inaccessibility of MLIS Education

1. The current situation/key challenges:

- MLIS is difficult to do part-time
- Can't do the whole program online
- Insufficient dialogue between employers and LIS educators
- Takes a long time to change curriculum

2. Potential strategies:

- Post grad certification
- Have LIS schools assist with accreditation of foreign professionals
- More and more regular dialogue with LIS schools
 - Teaching at schools (Professors of Practice)
 - Influence the research agenda
 - Collaborate with LIS schools on an internship program

3. Most promising strategies:

- National internship strategy

Key considerations:

- Why don't we teach management and leadership in LIS?
- There are gaps with things like NELI, can only send so many people per year. A more comprehensive program is needed.
- Lots of these programs around, but we have to have confidence in these programs.

GROUP F

Identification of Promising Strategies Day 1

Facilitator: Fay Hjartarson
Note taker: Jason Hammond

Issue 1 – Ongoing Professional Development

1. The current situation/key challenges:

- lots is happening but very scattered (library conferences, web conferences, etc.), need systemic best practices strategy
- need to understand municipal framework, how they think
- need self-development (i.e. another Master's degree)
- continuing education is very much focused on day-to-day practice rather than the big picture skills you need as you move up in organizations. Creates perception that you need to hire outside the organization
- Partnership's one-off training sessions are really useful, especially for smaller organizations
- having the resources to give staff time to access those resources is a challenge
- skill sets/training required do not match
- formal education not in tune/meeting needs
- lots of skill sets aren't directly library related (marketing, HR, systems) and these people are often pricier
- local/regional/national approach is not the same
- who has best approach is important
- scalability is important
- "specialty" training for non-specialist in libraries (ie. finance)
- bring those specialists in instead
- "talent management specialists" can track what skills you have available in an organization
- backfilling those on training? costly so a big challenge
- need individual commitment to continuing education
- value of continuing education must be inculcated

2. Potential strategies:

- come up with training figures that work for organizations of different sizes across the nation (2% - 2.5% of operating budget is recommended figure in other industries)
- develop training policy with "musts", "mights" and "maybes"
- not all staff will need the same \$\$\$ investment
- strategy needs to include non-professional librarian staff, all are important to the success of the organization
- on the other hand, it is the professional librarians who direct the organization who are core to the library's continued viability
- front line staff affect what people and politicians think of your library
- using existing programs rather than invent new leadership/training programs
- where are the best practices that can be leveraged?

3. Most promising strategies:

- Develop a model training policy on staff training that includes recommended targets for types of education for different employee categories and those at different career points as well as methodologies and budgets for continuing education

Key Considerations

- we need to frame expectations for Summit
- gap between what people need and what is available
- shelvers are often entry-level positions and deserve training too on that basis
- 8R's has identified the gaps

Issue 2 – Filling Expected Shortages

1. The current situation/key challenges:

- deficit of MLIS's, especially in Toronto and major centres
- need to look at how we use professionals
- are there skill sets that we can find in other places?
- lack of predictability in when people are going to retire
- attitude is important when hiring, we should track “smiles per hour” instead of “circs per hour” as a core statistic
- shortage of MLIS's (at least that you're willing to hire) – many new grads are lacking both technical and soft skills
- some employers test applicants' skill sets as part of their interviewing (here is some material, create a press release in twenty minutes)
- rural/urban recruitment issue (cost of urban living and sparseness of rural lifestyles)
- people in the communities who would make good librarians IF they had MLIS
- bigger centres need full-time jobs to attract candidates who can make a go of it
- need more diversity in our professional staff
- mentorship strategies for qualified specialists to share their knowledge with others
- interest free loans for staff to go to school, small cash bonuses for those pursuing education

2. Potential strategies:

- subsidizing or completely paying for further education
- learning contracts for those being funded to return to school
- need to re-brand and re-image librarians (and libraries too so you don't contradict)
- focus on raising salaries for professionals to compete with other areas
- share expertise beyond your local library – regionally or provincially or nationally
- recruit and accommodating foreign-trained professionals
- national salary review

3. Most promising strategies:

- National Equivalency Databank (Are there other comparables we could use in other countries or sectors such as BC's course comparison?)
- Re-imaging of profession (including national salary review that is regionally appropriate)

Key Considerations

- if you subsidize staff education, you need to have a contract
- can't create a culture where people expect to be paid for all training, need some personal responsibility
- no guarantee of a job at their new higher level when they return – they'll have to apply like

- everyone as positions become available
- national equivalency program to clarify differences between programs here and abroad

Issue 3 – MLIS Education

1. The current situation/key challenges:

- lots of MLIS grads only think of one area (ie. academic) without considering public
- advancing current employees to higher levels of education/responsibility
- MLIS degree should be as rigorous as MBA and other professional programs
- we need a new model of accreditation for library schools?
- MLIS programs are too practical, need to be more strategic, visionary/management based
- MLIS programs should borrow courses from other disciplines
- “Is Library Science even a discipline?” (no, according to one study mentioned)
- Public libraries need to take advantage of co-op opportunities with library schools
- professional programs socialize people
- MLIS programs need to be relevant, however you define that.
- library schools don't serve libraries, they serve their parent institutions. They don't ask libraries for feedback.
- what skills do MLIS students need? Business cases? Management skills? Life skills?
- Need high-level competencies (not “can work a spreadsheet” but “can manage a budget”)
- Government Finance Organization of America has case studies and can send them to people

2. Potential strategies:

- establish an online Canadian distance MLIS program
- more spots in accelerated MLIS program, other schools besides Western should offer this option
- libraries need to develop a dialogue with library schools about what's working well and not so well
- establish an institute that fits between library schools and libraries that helps link/bridge not only librarians but other professionals to work in the library world
- require a two-credit thesis to increase respect of the degree
- new accreditation process that changes the focus completely may be needed
- local or regional alternatives to library schools could be useful
- need to own the value of the Master's and not discount it ourselves

3. Most promising strategies:

- have a dialogue between schools and employers to bring together real needs to matching education with job requirements using case-based approach, GFOA model from the US
- raise level of academic rigor (i.e. thesis)
- establish MLIS alternatives at a regional and local level

Key Considerations

- do online courses give a different type of skill set? Do you still need a residency requirement?
- BC has online “Community Library Program” which serves people in smaller and northern communities for a very inexpensive cost
- you need to ask for feedback about everything

GROUP G

Identification of Promising Strategies

Day 1

Facilitator: Alvin Schrader

Note taker: Jess Posgate

Issue 1 – Ongoing Professional Development

1. The current situation/ key challenges:

- staff is disinterested in professional development
professional development is seen as employer-driven and obligatory, not a sense of commitment
- in organizations with mainly female staff, the dedication to professional development fluctuates with availability
- people are already overworked, and don't have time to branch out or apply new learning in the workplace
- people aren't interested in taking responsibility for their careers; achieving security is enough
- organizational culture is not conducive to new ideas or integration of new learning
many "old guard" are repeat attendees at PD events, so new professionals consider that role as "taken care of"
- few opportunities for leadership in the workplace for most staff
- money is available for PD and training, but time and rewards are not

2. Potential strategies:

- organizations and management need to build time and support in to staff involvement to encourage and allow for professional development
- let staff build their competence with small steps within the organization
- dialogue needs to be established that links organizational goals and needs with staff training opportunities and rewards
- senior professionals should be advocating and mentoring new professionals for PD opportunities
- organizations need to learn and integrate HR practices to allow organization to change with time
- PD and training need to be more than one-shot experiences
- programs need to be tailored to the users and their goals
- formal career path strategies would help professionals focus their PD and training; would also benefit the organization as part of their successive planning
- organizational culture must open up and encourage more flexible ways of thinking about itself and the organizational goals

3. Most promising strategies:

- Establish a multi-faceted competency-based training schema at a national level that provides a core set of guideline for measuring career development and defines targets for staff and training needs for HR planning as well as competency measures that are appropriate for all

different kinds of library organizations

- Create a set of managerial training institutes that incorporate different levels and stages for early, mid-career and senior -level management professionals whose deliverables are: skills and competencies; cohort network; mentorship network

Key Considerations

- Much of the discussion circled back to questions and strategies regarding necessary changes to MLIS educational programs, where strategic reconfiguration of recruitment, coursework, and practice should be implemented in order to alleviate some of the continual problems with professional development later on in people's careers

Issue 2 –Filling Expected Shortages

1. The current situation/ key challenges:

- gaps are being filled by non-professionals or staff with other professional backgrounds—this diversifies the workplace but also de-professionalizes the work and the library can lose sight of its goals because of the diffusion
- libraries are in competition with other services for municipal support
- upper level management is often replaced with people who are not librarians, with ill effect

3. Potential strategies:

- provide funding for library students who have to travel to school with the mandate that they return to their funding province (town/city) to practice in a library after graduation
- advocate to municipalities to recognize the value of libraries in the community
- mandate that upper level management must be from library background
- look at the health and university sectors and other professions where there is resistance to management responsibility for models on diversity building and succession planning

3. Most promising strategies:

Note: The group did not have time to address this question for this issue, as issue 2 was discussed last in this group.

Issue 3 – MLIS Education

1. The current situation/ key challenges:

- students are not screened or recruited, so the LIS schools are not training people who are committed to the field necessarily, but to some other, vague idea about what being a librarian is
- schools are not preparing students for the real work world
- students are not aware of the expectations of the workplace, especially in regards to management responsibilities
- MLIS programs do not recognize workplace experience as credit toward the professional degree
- MLIS programs do not have mandatory workplace experience as part of the degree
- MLIS schools and achieving a degree is not necessarily accessible, physically, financially, and time-wise for people in remote, rural locations or people who are already working
- online programs do not meet everyone's abilities to learn

- LIS schools are not connected to the community well enough to keep abreast of meeting needs in the field

2. Potential strategies:

- online MLIS degree programs that include face-to-face components
- MLIS programs should have practicum or internship requirements
- include rural or remote placements for practicum students and interns to encourage “grow-your-own” library professionals for those communities
- recognize workplace experience as credit in formal degree programs
- recognize other certifications within the profession and against MLIS degree requirements
- LIS schools should have an advisory board of practitioners to ensure they are aware of what is happening on the ground
- LIS schools could be hiring more practicing professionals to teach as well

3. Most promising strategies:

- Develop a mixed-mode, multi-institutional Canadian collaborative **online MLIS program** with a bilingual option
- **Create and embed internship programs** into MLIS experience so that students apply their learning within the workforce; this will also give the students hands-on experience with the profession so that they will know what they are into; and interns will be integrated with existing staff so the learning goes both ways.
- **Include the Prior Learning Assessment Recognition (PLAR) model in the graduate MLIS program entrance requirements** to acknowledge experience of people with applicable workplace skills and reduce degree fulfillment time for people who have been working but want to upgrade their professional accreditation

• Key Considerations:

- Online learning doesn't necessarily work well for some cultural segments of Canadian society (studies show this about the aboriginal community), so face-to-face support and networking is crucial
- internship program will require that there be a pool of opportunities created as well, which means getting buy-in from established professionals
- interns and practicum student placements may be resisted by some unions who might feel threatened by the “free” work provided by external people

The following represents a summary of the promising strategies and initiatives ideas generated on Day 1; they were regrouped by theme to support breakout group discussions on implementation plans.

Issue 1: Ongoing Professional Development

- National continuing professional development (CPD) framework as tool that can be used by institutions and individuals
 - Model training policy that covers various employee categories and career stages; recommended budgets and best practice methods for CPD delivery
 - Evidence to encourage employers to invest in CPD
 - Recommended reward structures for staff who invest in CPD
 - Professional development schema for individual self-assessment (CanCILIP certification)
 - Current competency frameworks
 - Impact on CPD and MLIS education curriculum
- Outcomes- and competencies-based leadership and/or management institute
 - Key function: Increase accessibility and diversity of leadership institutes
 - Example: Research Fellows Program: mid-career leadership 'job shadowing' and experiential learning (could be partnership with Association of Research Libraries)
 - National program of exchanges: e.g. temporary 'learning secondments for management skill development
- National internship and mentorship program
 - Benefits
 - Recruitment incentive
 - Could be targeted towards different career stages
 - Early impact professional development
 - Could be used to encourage diversity of recruits

Issue 2: Filling Anticipated Shortages

- Proactive marketing of profession
 - Example targets: high school and undergraduate students, other discipline graduate students
 - Enhancing attraction of the profession
 - Example: Increasing salaries
- National internship and mentorship program
 - See National mentoring program
- Foreign credential recognition strategy
 - National equivalency databank of course comparisons
 - Best practices in other countries

Issue 3: Accessibility of MLIS Education

- Evidence of accessibility challenges?
 - Types of accessibility (intellectual, geographic, language, cost, etc.)
 - Distance education program
 - Develop mixed model delivery: low-residency face-to-face and online, collaborative program, with bilingual option
 - Learning from expert institutions in distance education
 - Collaborative system: e.g. WISE
 - Is it feasible or necessary to create greater accessibility to Canadian MLIS programs in the next 5 years? If not, what other strategies?
- Enhance scholarships to MLIS programs in the US?
- Blended programs: MLIS/MBA, MLIS/LLB, etc.

Other

- Formal communication channels for employer-educator discussions
 - Impact on curriculum, entrance requirements
 - Exchange information on: emerging competencies
 - Dialogues on prior learning and assessment recognition
 - Professors of practice

Considerations for All

- Funding, e.g., ensure national funding source: IMLS
 - To support ongoing research into the field?
 - To fund program initiatives such as internships?
 - Are there current funding sources that could be tapped for programs? (HRSDC, Heritage, provincial ministries for libraries)
- Learning choices e.g., experiential learning

APPENDIX F – BREAKOUT GROUPS FOR DEVELOPING IMPLEMENTATION PLANS

The following themes / promising strategies were assigned to the following groups, in order to develop draft implementation plans:

GROUP	THEME / STRATEGY	FACILITATOR	NOTE-TAKER
A – Associations	<ul style="list-style-type: none"> Filling anticipated shortages 	Ernie Ingles	Diego Argaez
B – Canadian Association of Research Libraries (CARL)	<ul style="list-style-type: none"> Outcomes- based and competencies-based leadership and/or management institute Formal communication channels for employers-educator discussions 	Hélène Carrier	Liz Hayden
C – Canadian Association of Research Libraries (CARL)	<ul style="list-style-type: none"> Outcomes- based and competencies-based leadership and/or management institute 	Kathleen De Long	Katrine Mallan
D – Canadian Council for Information Studies (CCIS)	<ul style="list-style-type: none"> Accessibility of MLIS education 	Fiona Black	Steven Chabot
E – Canadian Urban Libraries Council (CULC)	<ul style="list-style-type: none"> National internship and mentorship program 	Adele Kostiak	Amber Bannon
F – Canadian Urban Libraries Council (CULC)	<ul style="list-style-type: none"> National internship and mentorship program 	Fay Hjartarson	Jason Hammond
G – Other Public Libraries	<ul style="list-style-type: none"> National continuing professional development framework, as tool that can be used by institutions and individuals 	Alvin Schrader	Jess Posgate

GROUP A

How to Implement the Promising Strategies

Day 2

Facilitator: Ken Roberts

Note taker: Diego Arguez

Strategy: Fill anticipated shortages with proactive marketing

1. Outcomes or results we expect to achieve by 2014

- More applications
- More diverse applications
- Diverse workforce
- Aboriginals, non-Caucasians, etc; seek higher LIS enrollments from these demographic groups
- Retention planning, flexible
- More LIS grads will work in libraries
- LIS Schools and libraries will market flexibly – not just undergrads and graduate students, but high school students as well – find a way to get the ear of guidance counselors
- Career satisfaction rate of ~90 is a key selling point – we have great stories to tell; potential for a clear market advantage
- Produce pieces that convey the breadth and depth library careers offer to potential recruits – illustrate that there's a lot more than books
- Make the profession attractive to managers and programmers
- Remuneration must be revisited
- Flexibility of working arrangements
- Attractive fringe benefits
- Marketing will also encourage information professionals working elsewhere to re-enter the library sector
- Flexible (paid) internship opportunities that will enable people to move through various information sectors
- Flexible secondment opportunities – various levels; also available to professionals who've reached advanced stages in their careers
- Encourage professionals to make moves to different information sectors
- Get new, young recruits quickly up to speed for those who stand out and demonstrate drive and ability
- Attract more men into the profession; broaden the way it's marketed – e.g., "this is the information age, why not work in the information profession?"

2. Implementation Plan

Key actions (and sub-actions)	Potential contributors/partners and their roles
<ul style="list-style-type: none"> • Manage the perceptions of libraries – proactive marketing • Play up the fact that we are one of the only profession that takes in people from all backgrounds – humanities, social sciences, health sciences, pure and applied and engineering sciences • School teachers, guidance counselors • School librarians involved 	<ul style="list-style-type: none"> • Hire or create a marketing team
<ul style="list-style-type: none"> • Flexible Internships / secondments 	<ul style="list-style-type: none"> • Associations, ASTED, CARL, CBPQ, CLA, OLA, etc
<ul style="list-style-type: none"> • Foreign credential recognition [good examples available with American websites that already explain what foreign professionals need to practice librarianship] • A toolkit for foreign professionals who want to practice in Canada • National equivalencies register/database – education, training, experience, and competencies (start by harmonizing what's in Canada) • Educational top-up: Small number of courses on top of other degrees that are relevant to the information profession • This is a global vacuum currently • Consider language issues; language training important – international recruitments • Advocate literacy programs; appear as an engaged entity (the library community) to the public • Technological savvy 	<ul style="list-style-type: none"> • Blue Ribbon Task Force (CLA put together and direct) • Comprised of Assoc. , LIS schools, key employers, Universities/Colleges

Key Considerations

- Filling positions is in the hands of the employers; market to them too
- Will the shortage materialize as we expect it too

- Retention can help fill some shortages too; again engage with employers [fills seats, but doesn't recruit new people, but you will have people doing things they like and which they are good at]
- More library positions will be filled by non-librarians
- 50% of LIS grads do not end up working in libraries ; McGill and EBSI for example get over 200 apps/year and take in ~100
- Need to make it easier to move pensions geographically, and across sectors
- Tap into potential of techs and clerks
- Don't think too much about current barriers; consider what the ideal state would look like, and determine what first steps can be taken within the current state
- Play the attractive aspects – breadth and depth of opportunities, high transferability of skills – in spite of being less lucrative than some career paths – e.g. programming for an IT firm, MBA positions, other private sector jobs, etc
- Support for school libraries can pay dividends in terms of marketing the profession
- How would a national equivalency register be kept up-to-date? Who'll be in charge of maintaining it? How would the inclusion criteria be refreshed when necessary?
- The profession is not bound by a licensing requirement – e.g. CILIP model / job exchanges, etc
- Develop an educational policy statement
- More professional rigour can be achieved by

Considerations for all: FUNDING FOR RESEARCH AND INTERNSHIPS

- Involvement with more research – finding partners attached to PhD programs to tap into existing funding sources such as SSHRC
- Flexibility for professionals who don't want to leave their jobs, but would also like to pursue PhDs in LIS
- Rapidly changing times need to be informed with ongoing research
- Consider how research can be conducted to support advocacy
- Address criticism that LIS research is not always unbiased or is more geared toward trade literature
- More and more academic librarians have a research requirement in their jobs; this is another source the profession can tap into
- CARL Library Education Working Group addressing the issue of researcher librarians; encourage uptake of 100+ burning questions among practicing academic librarians
- Consider other sources of research questions as well
- Move beyond “How I done it good” research to evidence-based research
- Broaden granting agency awareness of the need for more basic, and evidence-based LIS research
- Medical and Special library associations already have statements about research
- Could CLA develop a policy on LIS research that articulates what LIS research is for
- Employer recognition of research as a key professional activity – PRACTICE AND PROVIDE

GROUP B

How to Implement the Promising Strategies

Day 2

Facilitator: H el ene Carrier

Note taker: Liz Hayden

Strategy: Outcomes and competencies based leadership and/or management institute

1. Outcomes or results we expect to achieve by 2014

- how many people do we want to engage with this institute?
 - perhaps 50 people annually over 5 years to provide a pool of young trained librarians to fill the identified gap.
- what is going to be our ROI if we have the institution?
 - quality applications to management positions because we have filled the gap
 - see excitement and interest in management
 - an inclusive program, good for institution as a whole (cross disciplines) -graduates will have broader view
 - oversubscription to program
 - a bilingual program
 - there will be a link to the mentorship and internship programs
- what is success from the participant's perspective?
 - if candidates cannot verbalize what they need in terms of leadership, then how can they judge success?
 - pre-assessment work...of the people interested in the leadership course, what do they feel they are missing to move up to the mid or upper level positions? HR, finance, etc.
 - how do we get passed the fear that the potential candidates have about taking on management position? excitement and interest needed in the mid level positions
- how do we identify the skill set required for the future

2. Implementation Plan

Key actions (and sub-actions)	Potential contributors/partners and their roles
<ul style="list-style-type: none">• find a provider• -create a cohort	<ul style="list-style-type: none">-ask Canadian library community for a sponsor-CLA, CARL, LAC working together
<ul style="list-style-type: none">• find resources	<ul style="list-style-type: none">-ask Northern Exposure to provide advice
<ul style="list-style-type: none">• build curriculum• start with what is out there• consider a modular approach• survey the community and build a curriculum	<ul style="list-style-type: none">-ask ARL to create a Canadian version for all library types
<ul style="list-style-type: none">• needs identification• feedback• evaluation	

<ul style="list-style-type: none"> • above with librarians from every type of library 	
<ul style="list-style-type: none"> • create awareness of the importance of management in the profession 	
<ul style="list-style-type: none"> • getting past the fear 	
<ul style="list-style-type: none"> • candidates have to self-identify 	
<ul style="list-style-type: none"> • linking in the mentorship program 	<ul style="list-style-type: none"> -identify existing programs in Canada -tap into some American models -identify list of nationwide mentors and let staff find their mentor

Key Considerations

- we would have lots of applications for middle management jobs
- how many people do we want to engage with this institute? Perhaps 50 people annually over 5 years to provide a pool of trained librarians. All the young people that need to step up and fill the gap.
- use as a tool to encourage the young people to try interim assignments and be ready for a larger management position
- opportunity to build convergence between the different disciplines
- go back to the community and see where they would see themselves in such an institute//but at Northern Exposure they do not consult to create the course and it is oversubscribed
- pre-assessment work...of the people interested in the leadership course, what do they feel they are missing to move up to the mid or upper level positions? hr, finance, etc.
- an example= a modular one or two day intro to the basics (series of themes linked to management like HR, finance, etc)...
- how do we get past the fear that the potential candidates have about taking on management position? Excitement and interest needed in the mid level positions
- variety of training needs, depends on self awareness of individual; difficulty of individual being able to verbalize what they need
- how do we identify the skill set required for the future
- we need a range of programs...different levels of positions (e.g. for first-mid-upper levels of management) BUT we have Northern Exposure for the first level and we have Niagara Institute for senior level, what we need for 2014 is the mid-level training
- we need to get people comfortable at the mid-level
- are all libraries facing the same issues? yes, as per 8R
- mid-career leadership institute, distinction between leadership and situational management
- have people self-identify interest in career enhancing opportunities, connect to the internship program being developed...problem with this is it is another potential for problem for existing managers who have to fill positions that are vacated temporarily by the librarians who get scooped up by other libraries
- create a business plan (idea= create a general pool of funds/resources)
- bilingual??
- creating a link between the institute and the mentorship program...
 - at LAC, Emeritus program: no longer employee, but want to maintain a link with LAC, can be a mentor
 - tap into some American models

- cannot force mentor relationships, create national list and let people find their own mentors (a mentor Facebook)
- Society of American Archivists
- what is success from the participant's perspective? if candidates cannot verbalize what they need in terms of leadership, then how can they judge success?
- what is going to be our ROI if we have the institution?
 - quality applications to management positions
 - see excitement and interest in management
 - an inclusive program, good for institution as a whole (cross disciplines) - graduates will have broader view
 - oversubscription

Strategy: Formal communication channels for employer-educator

1. Outcomes or results we expect to achieve by 2014

- what is going to be our ROI ?
 - national advisory committee: cross-fertilize, improve effectiveness
 - local advisory committees: cross-fertilize, improve effectiveness
 - have practitioners accept to work teaching in the schools so that there is a base level of communication...affect on curriculum, bringing real world experience to the school/other professors; need cross-fertilization, not just people all from same area/school, get fresh perspective
 - library schools able to respond to emerging needs in a timely manner
 - professional librarian taking on individual responsibility in the matter of communication (and not only relying on the various organizations)

2. Implementation Plan

Key actions (and sub-actions)	Potential contributors/partners and their roles
• define national advisory committee role	-CCIS
• diversify local advisory committees	
• seek to have practitioners teach	-submit a course to be considered
• library schools need a process to identify emerging needs	-CLA to host a summit
• practitioners need to show individual responsibility	-submit a course to be considered

Key Considerations

- they already exist, but we are not all near one; not all advisory groups work as they are intended (feeling like they don't want to hear what we have to say); mechanism we have needs improvement
- have practitioners accept to work teaching in the schools so that there is a base level of communication...affect on curriculum, bringing real world experience to the school/other professors; need cross-fertilization, not just people all from same area/school, get fresh perspective

- advisory committee for each school also has to be cross-fertilized
- are library schools trying to be all things to all people, too much?
- look at effectiveness of advisory committee and seek to diversify them
- lib schools responding to emerging needs...survey, user assessment (e.g. market awareness of MBA programs...if market shows need for X, schools will be teaching X within a term)
- which schools have adapted or have the capacity to adapt to emerging needs
- facing the challenges of change...how difficult even a course introduction can be today
- accreditation imposes some limitations on programs
- shortage of PhD, just like shortage of middle managers
- individual responsibility...we all have to accept our responsibility in the process

Strategy: Funding for IMLS

1. Outcomes or results we expect to achieve by 2014

- HRDC/CFI/SSHRC -do they have a program?
- look outside Canada for other sources...UK, US
- CHRC, dealing with HR issues in our field
- vendors that we all use that we could convince to provide support to the profession

GROUP C

How to Implement the Promising Strategies

Day 2

Facilitator: Kathleen DeLong

Note taker: Katrine Mallan

Strategy: Outcomes- and competencies-based leadership and/or management institute

1. Outcomes or results we expect to achieve by 2014

Vision: Established culture of leadership in Canadian Libraries

- By 2014 we would like to develop a national leadership program for Canadian libraries
 - Program that spans all stages of library careers (early, mid, late) and types of leadership (personal, managerial, senior administrator)
 - Will include elements of experiential and continuous learning
 - Program will have the capacity to accommodate a large number of participants (i.e. not just 30 people every 2 years)
 - Institutes will be bilingual
 - Evaluation component built in to the program to ensure that it is meeting stated goals
- Establish a formal coordinated mechanism for employers, associations, and universities to discuss leadership competencies and best practices to inform this institute/program
Desired outcome: to create a strong pool of candidates to fill positions in Canadian institutions and associations (focus on quality)
- Create a culture of leadership - "every librarian is a leader"
- Integrated, whole systems approach, through the development of a program with broad reach

2. Implementation Plan

Key actions (and sub-actions)	Potential contributors/partners and their roles
<ul style="list-style-type: none">● Develop a national steering committee led by LAC to research the demand side of the leadership question. "What do our stakeholders and communities identify as key leadership competencies?"	LAC to coordinate
<ul style="list-style-type: none">● Create a working group to review existing leadership programs and create an inventory which aligns outcomes to what we would like to achieve (vision, 2014 outcomes)	
<ul style="list-style-type: none">● Consider adapting the leadership models that have been identified as potentially productive to create a leadership program with multiple components (personal,	Steering committee of skilled representatives (CARL, CLA, LAC, regional groups, public libraries, LIS educators, etc.) to engage a facilitator/consultant to develop the program. Establish working groups to implement and

managerial and senior/administrative leadership)	further develop the program.
--	------------------------------

Key Considerations

- It is important to differentiate between leadership and management training
- Purpose is to educate people for more senior leadership positions - the environment (public, special, academic) is less important than the skills, competencies they will use to lead within their institutions
- Develop leadership capacity around the issues they are interested in - leaders at all levels - the process by which we inspire others to achieve throughout the organizations - strive for a culture of leadership in the profession
- "Every librarian a leader" - leadership doesn't necessarily lead to management positions
- Are experiential learning institutes preferred? An "institute" alone may not be effective.
- Sense of urgency! Time is not on our side.
- We work in collegial institutions, not hierarchical institutions. Strategy has to work in these
- Talk to the supply side (librarians in the field for 2, 5, 7 years). They have to be engaged in the model because they are the future leaders we are talking about
- Leadership training has to be a part of a cycle that includes the home institute. The "rules of engagement" of leadership have to be incorporated into home institutes.
- Leadership is situational. Leadership is not always democratic.
- We can't find the perfect approach.
- Other opportunities tend to be quite expensive (i.e. MBAs, Western program,
- We are working on a culture change ultimately
- Foundational need: ask the various constituents (university presidents, faculty, government, users...) what they want from librarians to inform how we proceed with our leadership activities.
- ARL program can be easily transported into Canada
- CARL could sponsor this program. It could be held 1 or 2 a year, around a conference
- Look at their program and how it could be delivered in the Canadian context "Canadianize"
- Test whether or not it could work.
- Work with other associations to define their professional issues.

GROUP D

How to Implement the Promising Strategies

Day 2

Facilitator: Fiona Black

Note taker: Steven Chabot

Strategy: Accessibility of MLIS Education

Reviewing yesterday's work:

While there is much anecdotal evidence showing that there is a demand for distance programs, but we are lacking substantial research demonstrating problems with accessibility. Information from the 8Rs study was cited, and time, cost, and distance from a library school were identified as problems for 413 paraprofessional staff who wanted to attend MLIS programs. Yet, online is not a total solution: there is a need for face-to-face.

There was also a concern that all of the current professionals would be replaced upon retirement at a one-to-one ratio, and more research and evidence in this area is needed. Intellectual accessibility related to ALA admissions criteria demanding an undergraduate degree.

Regretfully, we have no stats showing how many are attending DE in Canada. Is there a need, and if yes, how to finance. Yet, stats will always be an issue, and we will never have enough data.

Advantages and disadvantages of software solutions.

1. Outcomes or results we expect to achieve by 2014

- Educators:
 - Shared DE electives offered by all schools with reduced residency at home school on a modified WISE model.
- Employers/unions:
 - Funding for students. Association, nation, or region wide structure. Must also provide paid time for study. But also need to see a return on investment from educators, as they are now a major consumer of library education.
 - May need to develop a model or guideline for employers.
 - Succession planning/succession management needed in 100% of employers. Clear evidence of a lack of this happening. Review of needs based on potential organizational restructuring.
- Educators/Employers:
 - Management skills development: courses and training and attitude.
 - LIS and Lib. Tech dialogue needed to examine relationships. Lib. Tech performing many professional duties and reaching glass ceiling. Related to potential org. restructuring. Dialogue with employers as well: courses cannot be designed without their input.
 - Employers may need models for customizing their own educational needs and courses.
 - Co-op/internship guidelines: are mostly project based, but does not expose students to realities of work environment.
- National level.
 - Central funding akin to IMLS. Could devote grants to Aboriginal students.
 - Education and employers strategic partnership to target HRDC and others.

- Gender imbalance: Lib Tech and LIS field. Have conference presentations from nursing and social work reps who have worked to recruit men. We have to ask why we are not talking about this issue. Put forward to ALISE committee.

2. Implementation Plan

Key actions (and sub-actions)	Potential contributors/partners and their roles
<ul style="list-style-type: none"> ● Shared DE electives offered by all schools with reduced residency at home school on a modified WISE model 	Educators
<ul style="list-style-type: none"> ● Increase diversity <ul style="list-style-type: none"> ○ Funding and paid time for study. Guide for employers. ○ Recruitment plans to address gender and Aboriginal imbalances. ○ Recruitment materials on employer websites. ○ Presentations and discussions at conferences around gender imbalance. ○ Diversity bursaries from employers and associations. 	Educators, Employers, and Unions
<ul style="list-style-type: none"> ● Investigate central funding and budget model and options (e.g. HRDC) for DE 	Educators and Employers
<ul style="list-style-type: none"> ● Research and publication of results concerning organizational restructuring. 	LAC-BAC and Employers
<ul style="list-style-type: none"> ● Increased MLIS and Lib Tech Dialogue. Co-op and internship guidelines. Models for customized courses. Management skills development (courses + training + attitudinal shifts) 	Educators and Employers

3. Tracking Progress and Success

- 50 students enrolled in reduced residency/distance education model. Perhaps reduced to one term residency.
- Published reports on restructuring library organizations.
- Tracking tool in place for where students are from and where they go in terms of job type and geography. WILIS model?
- Established marketing campaign re: diversity. Must be a coordinated campaign: associations, schools, and employers. Survey key employer's sites to judge campaign uptake.
- Funding from employers to support doctoral study and educational leave.

GROUP E

How to Implement the Promising Strategies

Day 2

Facilitator: Adele Kostiak

Note taker: Amber Lannon

Strategy: National internship and mentorship program

1. Outcomes or results we expect to achieve by 2014:

- The internship program is developed with an initial focus on new graduates. We envision that the program would be managed by CLA and ASTED with input from many others (see implementation plan).
- A pilot internship program is established, the program components:
 1. Employers identified and committed
 2. Framework for operations
 3. Application process developed for both employer and interns
 4. Employers are encouraged to establish an internal mentoring program to be considered for the program
 5. Program incorporates and encourages diversity
 6. Program is organized around a project
 7. Paid experience
 8. Participants need to be exposed to more than one specific work experience
 9. It must be for an appropriate length, a defined extended period
- This is a recruitment initiative, could also be a means of assessing a candidate for future employment, and also for introducing diversity
- Result can also be used by employers to give input to educators about curriculum (employers)
- By 2014, another pilot internship program is in place for new immigrants based on the one described above

After 2014:

- A national mentorship program is developed with an initial focus on management track Librarians based on the internship program, what the program looks like:
 1. Established criteria for choosing appropriate mentors
 2. Established criteria for selecting mentees

2. Implementation Plan for internship program:

Key actions (and sub-actions)	Potential contributors/partners and their roles
<ul style="list-style-type: none">• Establish task force/steering group	Representation from CLA, ASTED, Educators, Employers, government
<ul style="list-style-type: none">• Framework for operation<ul style="list-style-type: none">○ Establish criteria for application○ Encompass all types of libraries in program (public, college,	Task force described above

university) <ul style="list-style-type: none"> ○ Smaller libraries group together to share interns ○ CLA/ASTED established as clearing house ○ Establish certification upon finish 	
<ul style="list-style-type: none"> ● Establish funding for pilot and full program <ul style="list-style-type: none"> ○ Establish scholarship 	Task force applies to government, CIC, sources for Aboriginal funding, foundations
<ul style="list-style-type: none"> ● Evaluation 	Task force

Key Considerations:

- Internship should encompass public, university, and college in the same program
- Should be open to both Canadian and international graduates
- Internships could at some point be used for staff who want to make a significant career change but stay in the profession (i.e. the academic librarian who wants to switch to public)
- Mentorship should be in place for all levels of the career
- Provides people leaving the career to give back after retirement
- Mentors need training as well, mentors need recognition for this work
- How to bring people in the program together for face to face meetings needs to be considered for the internship (funding)
- Mentorship could and should be expanded to higher levels
- Mentorship could be within/outside the organization
- Face to face meeting for mentorship is not necessarily required

GROUP F

How to Implement the Promising Strategies Day 2

Facilitator: Fay Hjartarson
Note taker: Jason Hammond

Strategy: **National Internship and Mentorship Program**

1. Outcomes or results we expect to achieve by 2014

- By 2014, wider co-op program availability, with a sharing of best practices, both between schools and employers, will give increased visibility of library work, give an opportunity to test new talent and practical work experience for new grads.
- In the next five years, a structure is developed for a national mentoring and internship program and by 2014, a pilot program is in place.

2. Implementation Plan

Key actions (and sub-actions)	Potential contributors/partners and their roles
<ul style="list-style-type: none">• Co-op programs should exist at all library schools and co-op placements should be a requirement for a student obtaining a degree	Library schools, all potential employers
<p>Develop a task force for a national mentoring and internship program.</p> <p>Key actions:</p> <ul style="list-style-type: none">• Create Task Force <p>Sub-Actions:</p> <ul style="list-style-type: none">• find funding• conduct research• develop models• share best practices nationally <p>Activities:</p> <ul style="list-style-type: none">• investigate ways of doing job exchange• investigate job shadowing to share specific skills• leverage existing centers of excellence/salon	All stakeholders

Key Considerations:

- explore ways to share experience, talent, expertise
- offer options to recipients
- leadership and innovation funding
- ensure geographic diversity
- focus on other than large libraries/not exclusively

Placements

- placement are shorter than co-ops - weeks long instead of months? (Shorter placements aren't paid, co-ops are.)

Co-ops

- issues for co-op programs: salary, responsibilities, cost of moving, cost of living in destination city, interest in public libraries is less than academic postings
- employers need to build co-op positions into their budget
- should co-op placement be a requirement for obtaining your degree?
- can't be exploitive for students, must provide practical, useful, meaningful employment
- need a formal process for matching co-op job opportunities that is fair to all employers and students

Internship

- what is the role of internship? Is it like lawyers and doctors do before they ultimately "become" those roles? Is it for people still in school? Just graduated and wanting a deeper introduction to the profession? Someone at mid-career?
- practicum/co-op/placements happen at some schools but not all. Therefore, internships are what happens after you graduate as part of a continuum to increase your knowledge, gain practical experience and "fast track" people for positions that are coming available.

Mentorship

- focus on leadership/management
- talk force to conduct research, examine best practices, develop models
- working with people outside of libraries (ie. if you're building green libraries, talk to leaders in this area)
- we need mechanisms to share skills and knowledge, talent, expertise across the country
- need to look at where mentorship can go wrong as well as the benefits.
- need training standards and quality controls
- successful models do exist
- need to match needs and expertise, define how long the mentoring relationship is (set period, ongoing?)
- mentoring expertise for professional development
- peer to peer mentoring as well as experienced to mid-career or mid-career to new
- targeted to specific areas: ie. labour relations, the strategic planning process, board and city relations, decision-making, capital projects, new librarians, new directors
- need willing participants and good fits for the mentoring to be successful
- one to many mentoring - one mentor could serve multiple "mentees" - it doesn't need to be a

- one to one relationship necessarily (CLA conference could be a potential venue)
- can be virtual – phone, online, etc. - not just face-to-face
- a central database of willing mentors and their areas of expertise could facilitate relationships
- code of conduct

Other Related Areas

- other options for professional development: job shadowing, job exchanges
- “shadowing” is another element where you can find someone who's already done it.

Overarching

- communication between employers and employees
- geographic balance
- need leadership and innovation funding
- centers of excellence, places funded that would have a larger mandate to support the rest of the industry

GROUP G

How to Implement the Promising Strategies

Day 2

Facilitator: Alvin Schrader

Note taker: Jess Posgate

Strategy: Continuing Professional Development

1. Outcomes or results we expect to achieve by 2014

- Establish a bilingual framework of competencies for a Canadian context
 - Common/core competencies
 - Individual
 - Contextual
 - Transferable
 - Validation process for all levels of staff and functions within the profession
- Engagement Strategy with Employers
 - Recognize competencies
 - Value of ongoing learning
 - Demonstrated return on investment for employers and users
 - Responsibility of staff to pay forward to share learning in the workplace

2. Implementation Plan

Key actions (and sub-actions)	Potential contributors/partners and their roles
<ul style="list-style-type: none">● Create panel of experts to research and develop the competencies framework	CLA/ASTED/CPLQ/LAC-BAC, Daniel Caron/Graduate Library Schools
<ul style="list-style-type: none">● Consult with key stakeholders to validate competencies framework	All sectors
<ul style="list-style-type: none">● Plan for outreach to implement the competencies framework	Employers/educational institutions/municipalities (political bodies)

Key Considerations

- Representation of all sectors and levels of staff during planning process
- Canadian context for implementation requirements
- Avoiding top-down bureaucracy in overseeing professional development in general
- Resources: who would be responsible?

The following represents a summary Summit participant's evaluation of the event.

What did you like about the Summit? What was most useful?

- Networking, representation across sectors.
- Targeted and focused meeting.
- Good discussions on a topic of real importance.
- Presentations presented relevant and valuable content; presentations from the U.S. speakers, M. Sullivan and D. Caron were particularly appreciated.
- Good balance between presentations and discussions.
- There appears to be consensus on most of the priorities identified.
- Well organized and well planned event.
- Bilingual event.
- Excellent facilitation.

What suggestions for improvements would you make?

- More discussion and fewer presentations.
- Breakout groups including different sector representation to allow more cross-pollination; however, assigning breakout group participation by sector allowed for a more focused discussion.
- Would have needed a second round of breakout groups across sectors.
- Smaller breakout groups might have been more productive.
- Training for breakout group facilitators; narrower focus of discussion in the groups; more consistency across groups for process.
- Avoid using flip charts and go entirely electronic.
- More time for rapporteurs to coordinate their report would have been useful.
- More time for reporting back from breakout groups on Day 1 would have been useful (Day 2 debrief worked better).
- More time for lunch.
- Francophone participation could have been more efficient.
- Send background documentation well ahead of time; pre-summit definitions of the issues.
- Ensure that documentation is available to support the discussions when there are initiatives in place already.
- If hosting a shorter event, will need more focused goal.
- Expand to other sectors, e.g. archives, museums, special libraries, rural libraries, governments, employers, educators, etc.
- Being clearer re inclusion of special libraries, technicians, small employers, etc.
- Availability of participants list at the conference itself.
- Meeting rooms with windows; larger meeting room.

What do we need to do to maintain momentum?

- Disseminate the Summit report.
- Establish a task force.
- CLA to take the lead to avoid fragmented implementation.
- Ensure broad representation in the coordinating group.
- Coordination by LAC-BAC.
- Identify leads and contributors for each initiative rapidly.
- Establish priorities, actions, responsibilities and timelines; ensure there are mechanisms in place for updates on progress and follow up.
- Concentrate on one or two priorities to move forward effectively and completely.
- Ensure buy in from the community, joint ownership of projects/initiatives; involve constituents in moving forward.
- Keep the community informed and involved.
- Establish a communication strategy/communication plan.
- Write articles for key publications.
- Centralize the information (e.g. web site, wikis; central place for all information: reports, actions, players and opportunities).
- Provide data about requests (e.g. funding, participation on task groups, etc.)
- Hold an annual meeting; bi-annual cross sectoral meeting.
- Encourage participation in the survey (e.g. make it online, short and easy to fill) and provide summaries to share results broadly.
- Leadership institute, mentorship, link with library schools.

Any other comments?

- Concern that we are taking on too much; trying to solve many problems.
- Surprising to see that each sector knows little about the others.
- Some initiatives proposed already exist, but are not well known.
- Better dissemination of 8Rs data and performing various data analyses to understand the issues and how they relate to certain questions (e.g. language).
- Technician programs and technicians need to be represented on the steering committee.
- The bilingual reality of the work force and related challenges (training, mentoring, etc.) needs to be reflected.
- Good venue and good food.
- Great facilitation from Intersol.
- Thanks to the organizing committee.
- This was a very valuable event to attend.

APPENDIX I – SPONSORS

The National Summit on Library Human Resources was made possible with generous sponsorship or in-kind support from the following organisations:

Canadian Association of Research Libraries (CARL)

Canadian Library Association (CLA)

Canadian Urban Libraries Council (CULC)

Library and Archives Canada

University of Alberta

Their support is greatly appreciated.