

# **Strategic Plan**

## **2017 - 2020**

*Leading and inspiring the growth and innovation of the library and information services sector.*

## **OLA Strategic Plan 2017 – 2020**

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### **A Message from the Chair and the Executive Director**

#### **OUR HISTORY**

Founded in 1900, the Ontario Library Association (OLA) is the oldest continually operating non-profit library association in Canada. With approximately 5,000 members, the association is a platform to share experiences and expertise while creating innovative solutions in an ever-changing environment. OLA provides opportunities for learning, networking, recognizing, influencing, and celebrating within the library world.

OLA members are from public, academic, school, government, and special libraries or are students and job seekers. They are experts in research, curating information and ideas, and in the delivery of educational opportunities. Members participate in the association to develop library and information services that support Canadians in their pursuit of education, employment, and cultural interests.

OLA partners with a range of library associations and organizations to strengthen and support libraries and the people who work for them.

Our initiatives are driven by a strategic plan. The 2009 and 2014 plans provided a strong roadmap for OLA with four strategic priorities:

1. Growing Career Paths
2. Collaborating to Extend Libraries' Strategic Voice
3. Strengthening the Organization
4. Transforming Ideas into Solutions

#### **OUR PLAN**

As we embarked on the planning process for the 2017-2020 strategic plan, we recognized our context is rapidly evolving and our future priorities needed to ambitiously move us forward.

Our new strategic priorities for 2017-2020 are:

1. Focusing member services across diverse career paths
2. Influencing policy and demonstrating value
3. Building evaluation and research capacity
4. Addressing the unique needs of rural, and remote indigenous communities
5. Enablers: People, Technology and Fundraising

## WHAT CONSULTATIONS TOLD US:

The world is changing around us, driving the need for us to think strategically about our future. Consultations with our communities, members, partners and our staff team revealed:

- **Library and information services specialists are building roles well beyond the traditional physical library space**

An increasing number of library and information professionals are finding employment in a broad range of organizations, offering their expertise on organizing and managing information. Library and Information Science programs and Library Technician programs enable students to explore opportunities beyond traditional library settings. Those working in the broader sector seek engagement with OLA's services and educational offerings.

- **Information and technology advances at a rapid pace**

Technology maintains an important and relevant role in our communities and is thus an important factor in the professional development of library workers. Libraries play a strong role in educating and supporting Ontarians' use of the opportunities presented by the digital information world. New technologies of cloud applications, artificial intelligence, machine learning, and virtual reality will challenge our members to keep pace with the application of these advances in their communities. The issues of privacy and data protection will also affect the future of members.

In addition, our members desire new approaches facilitated by new technology platforms to access OLA's services related to education and networking.

- **Ontario's policy and funding environment is changing**

Libraries face funding challenges as they compete with other institutional, municipal, regional or provincial priorities. The ongoing lobbying and advocacy efforts of our members ensure that libraries maintain an important role in our communities. In the past three years, OLA has made significant strides in mounting a sound advocacy strategy. We will continue to strengthen and expand our tools and resources to influence policy and decision-makers on the value and impact of libraries.

- **Libraries are increasingly important hubs in their communities**

It has been well documented that libraries contribute to the economic and social fabric of the communities they serve. Libraries are hubs for lifelong learning, academic achievement, community development, entrepreneurial growth, youth engagement, experiential learning, employment support, newcomer integration, and social connection. School libraries support school curriculum, deliver education in information technology skills and engage Ontario's students in the critical thinking skills needed for post-secondary education and employment. In a knowledge-based society, libraries are critically important assets to every community.

These factors set the stage for moving into the future. OLA members are in a strong position to build on past successes and current capabilities; we have an eagerness to advance the library and information services sector. Our plan provides a platform for bold and purposeful action to mold our profession for the future.

The OLA Board of Directors would like to thank everyone that participated in the development of this plan. We are delighted to engage with members, partners, and supporters in pursuing this journey over the next three years.

A major enabler of our work was the facilitation of our consultant on this strategic plan – a special thank you to Susan Tremblay with Management Advisory Service (MAS).



**Leslie Weir**  
2017 OLA President



**Shelagh Paterson**  
Executive Director, OLA

## **A New Framework for OLA’s Key Strategies**

In the winter of 2016, OLA embarked on a robust strategic planning effort through a process that engaged members, staff, divisional councils, board members, partners and leading voices in the library field. A Strategic Planning Advisory Committee of the Board provided guidance and oversight into the planning process. The broad consultation culminated in a new mission and vision, as well as a new strategic plan to guide OLA’s priorities and energies over the next three years.

### **VISION**

Leading and inspiring the growth and innovation of the library and information services sector.

### **MISSION**

We empower our members in the library and information services sector to build informed, participatory, and inclusive communities through:

- R**esearch
- E**ducation
- A**dvocacy
- P**artnerships

### **VALUES**

Our values have stood the test of time and continue to guide us in our work.

<p><b>RESPONSIVENESS AND AWARENESS</b>          Our Association is responsive by connecting people to people, and people to ideas. In addition, it empowers our members by providing a platform for education and awareness of important issues. Members are encouraged to develop their own perspectives and views on critical issues and events.</p> <p><b>INTELLECTUAL FREEDOM</b>          Our Association upholds intellectual freedom and open, equitable access to library resources as basic tenets of our democratic society.</p> <p><b>DIVERSITY</b>          Our Association has a shared responsibility to support an inclusive environment within the profession and throughout the community with the provision of library resources and services that meet the needs of all library users.</p>	<p><b>LITERACY AND LIFELONG LEARNING</b> Our Association supports and cultivates a broad range of literacies and the pursuit of professional and personal learning, thereby improving one’s ability to participate meaningfully within an information-based society.</p> <p><b>INNOVATION</b>          Our Association is dedicated to accepting, promoting, and supporting continual advancements in library services while staying up to date with current trends and technologies.</p> <p><b>ACCOUNTABILITY</b>          Our Association believes in open and transparent business practices that clearly demonstrate responsible use of organizational resources for effective and efficient library programs and systems.</p>
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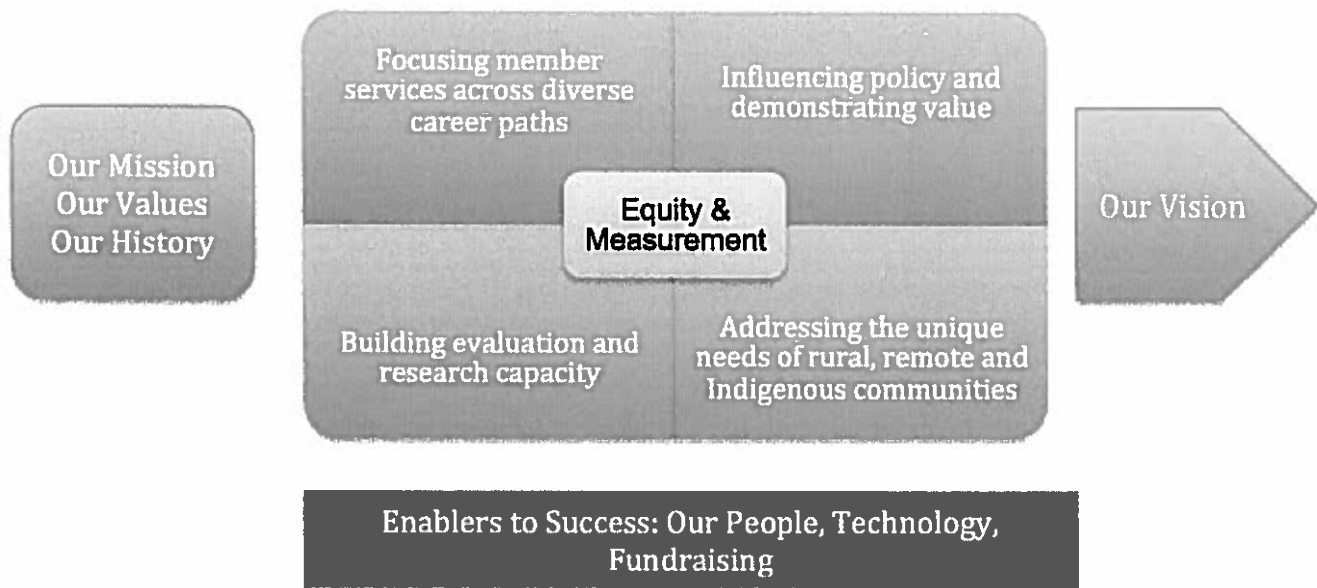
The OLA Strategic Plan is illustrated below. The launching pad for our plan includes our mission, our values, and our notable history.

Our **strategic priorities** will guide our actions until 2020:

1. Focusing member services across diverse career paths.
2. Influencing policy and demonstrating value.
3. Building evaluation and research capacity.
4. Addressing the unique needs of rural, remote and indigenous communities.
5. Enablers: People, Technology, and Fundraising.

There are also two overarching principles that will guide how we will critically assess and focus our efforts: Equity and Measurement.

- **Equity:** We will ensure our services and activities are provided in a fair manner that is responsive to the diverse needs of our membership. We will aim to address needs and requirements for members and libraries that experience obstacles to full participation and opportunities.
- **Measurement:** The principle of measurement has been articulated strongly throughout the planning process as a means of demonstrating value and responsibility. How do we measure the needs of our members, the reach and success of our programs? We want to our actions to be informed on data from our members. We want to know: where are new graduates employed, how many are joining OLA, how many early career members are accessing educational programs, and what impact does our advocacy work have? We will include the establishment of success measures when planning and delivering the programs of OLA.



## 2017-2020 Strategic Priorities, Goals, and Tactics

Last Updated: May 2017

- **Strategic priorities** are the focus for the association over the next three years.
- **Goals** are the desired outcomes for each strategic priority.
- **Tactics** are the means by which each goal will be accomplished.

**Note to reader:** 2017-2020 tactics are attached in Appendix A.

Timeline:

- The OLA Board will approve year one tactics at the September 2017 meeting.
- Year two tactics by September 2018.
- Year 3 by September 2019.

## **Strategic Priority 1: Focusing Member Services Across Diverse Career Paths**

Job seekers in the library and information field are increasingly finding employment beyond traditional libraries and in a wide range of organizations. They provide expertise in managing, organizing, and curating information and they may work as consultants or for library-related businesses. Those working in non-traditional environments continue to look to OLA for membership, however may not always find a fit within the current divisions. OLA strives to be an inclusive association. We need to explore ways to welcome and engage library and information specialists who work outside of traditional libraries.

### How our overarching principles apply

Equity of services and programs across careers and place of employment

Measurement of member needs, access to services, factors contributing to success, engagement in programs

Our strategic planning consultations heard from recent graduates who seek more support and services to help them find employment, mentoring, and education focused to their needs. We have an opportunity to build on our current career services and provide more tailored services for those early in their careers.

Both experienced members and recent grads have identified interests in leadership and management development, as well as mentorship support. In addition, public library board members seek learning opportunities to ensure library governance positions the library as a leading organization in communities.

OLA is highly committed to strengthening leadership and management capacity in the library sector by expanding member access to educational opportunities.

Our consultation with members also identified a growing interest in building communities of practice. The description for OLA's approach to communities of practice is best described in An Introduction to communities of practice: A brief overview of the concept and its uses (Etienne and Beverly Wenger-Trayner, 2015). To summarize: "Communities of practice are groups of people who share a concern or a passion for something they do and learn how to do it better as they interact regularly." A community of practice includes shared competence, supports interaction and learning, and practitioners.

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### THE PATH FORWARD: GOALS, TACTICS, AND OUTCOMES

**GOAL 1:** Engage with library and information specialists who work outside of traditional libraries.



**GOAL 2:** Engage with those new to the library and information sector and early career members.

**GOAL 3:** Expand and nurture communities of practice and develop improved platforms to support communities of practice.

#### WHAT WILL SUCCESS LOOK LIKE IN THREE YEARS?

- **Our membership reflects the broad range of environments in which library and information specialists are employed.** We recognize the growing number of library and information specialists working outside traditional libraries and welcome them to OLA either as new members or from strategic partner organizations.
- **Early and new career members are well supported through our career and educational programs.** We have a strong community of early career members who are engaged in our committees and volunteer initiatives, and we can measure this outcome.
- **Members are able to access more leadership and management programming through OLA and partner organizations.** Our partnerships with other organizations have opened up collaborative programs and encouraged access to multiple offerings.
- **Vibrant and successful communities of practice stimulate rapid diffusion of innovation and best practices.**

## **Strategic Priority 2: Influencing Policy and Demonstrating Value**

OLA members have ranked advocacy as a high priority, seeking the support of OLA in advocating at the provincial level, but also in providing advocacy and promotional materials that members can use in their local communities. Members regularly need to demonstrate the value of their libraries at municipal levels, with school boards, within their institutions, and across their communities.

The OLA board, divisional councils, and the OLA Advocacy Committee have continued to make advocating for our members a priority, with recent efforts focused on demonstrating the value of libraries and securing funding. Policy and funding issues that are of interest to libraries include the erosion of resourced school libraries, copyright legislation, fair pricing for e-book purchasing, access to broadband for rural and remote communities, and stronger supports for library services in Indigenous communities. OLA has also ensured libraries have a strong voice in various government consultations, including examples such as: Community Hubs, the Ontario Culture Strategy, newcomer services, municipal legislation review, and student achievement consultations. OLA has organized Library Day at Queen's Park events, resulting in a number of opportunities to speak with MPP offices about the essential contributions of libraries to the economy, education, culture and quality of life.

Staff and members of OLA have built a solid foundation with advocacy work and have provided an excellent launching pad for moving forward in the next three years. Our focus in the future will include developing targeted outcome goals for advocacy, collaborating with partners across a comprehensive agenda, building a broader network of local advocates, defining measures for progress and success, and addressing needs of members for local advocacy.

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### **THE PATH FORWARD: GOALS AND OUTCOMES**

**GOAL 1:** Grow and focus OLA's advocacy and government relations strategy on targeted goals and define measures for assessing progress and success.

**GOAL 2:** Grow and inspire a network of library advocates at local and provincial levels.

**GOAL 3:** Expand the development and sharing of advocacy resources, tools, and strategies for member use at the local community level.

### **WHAT WILL SUCCESS LOOK LIKE IN THREE YEARS?**

- **We have specific goals and measures for advocacy work that meets the needs of our members.** Our members have input into the advocacy agenda and are able to track progress.
- **We work collaboratively with multiple partners and share the advocacy agenda.** Our members can share their own efforts and see what OLA and its partners are undertaking.
- **We have a broad network of library advocates** who are actively engaged in building and implementing our advocacy initiatives. Library advocacy is an embedded role and competency for OLA members.
- **Our members have access to a range of content to support their local advocacy work.** OLA advocacy materials are supporting communities across Ontario.

## **Strategic Priority 3: Building Evaluation and Research Capacity**

Evaluation and applied research are needed to support the development of best practices for library and information professionals. Relevant research can help ensure libraries remain relevant and supported by the communities they serve.

While some research has demonstrated the economic value of libraries, there has been very little research undertaken on the social impact of libraries (i.e. literacy rates, employment status, newcomer integration, civic engagement, entrepreneurial success, etc.). Many OLA members have pointed to the opportunity for library practitioners to engage more actively in evaluation and research and some have eagerly called for specific professional development on assessment, evaluation, and measurement so they can truly demonstrate the impact and value of their work. In addition, OLA must continuously evaluate its efforts to ensure we are meeting the needs of our members and inspiring membership growth.

### How our overarching principles apply

**Equity** Engaging members across all divisions, job roles, and career span  
**Measurement** in user needs, member tracking, performance evaluation, impact of services

Evaluation and research has not been an area of focused attention by OLA in the past and will require a well-developed approach, resources and expertise going forward. Members have identified numerous opportunities for OLA:

- Support in moving research to the practitioner through knowledge dissemination and translation;
- To support advocacy efforts across the province
- Identifying topics for evaluation and research;
- Collaborating with universities and research bodies to help shape the research agenda;
- Building capacity in assessment, measurement and evaluation of library programs and services;
- Providing improved access to research and the impact of research to practitioners in the library field; and
- Providing small grants to stimulate and support evaluation and research initiatives
- Embedding research into OLA's operations so that we may challenge, develop or change programs and services.
- To support Advocacy

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## **THE PATH FORWARD: GOALS AND OUTCOMES**

**GOAL 1:** Develop an evaluation and research strategy that supports best practices and assesses the value of libraries.

**GOAL 2:** Build member capacity in areas of measurement and performance evaluation

**GOAL 3:** Integrate evaluation and research across all of OLA services

**WHAT WILL SUCCESS LOOK LIKE IN THREE YEARS?**

- **We have a solid strategy created by our members** that includes identifying research priorities annually, meeting intended outcomes, securing research resources and partners, and effectively disseminating research reports.
- **Our education and training initiatives in areas of measurement and evaluation are well subscribed.** Members are increasing their skill levels in these areas and there is an overall increase in library evaluation. The Super Conference attracts attendance at sessions addressing measurement and evaluation.

**OLA has integrated evaluation and research across many of its programs and members services.** OLA committees and staff continually examine and profile the results of evaluation assessments and change or develop programs and initiatives accordingly.

## **Strategic Priority 4: Addressing the unique needs of rural, remote and Indigenous communities**

OLA members from rural, , remote and Indigenous communities face challenges in serving their communities in an equitable way and in accessing many of OLA's services. Challenges include access to adequate broadband Internet service; limited staffing, technology, range of programming and materials; and meeting the unique needs of rural, remote or Indigenous communities. Indigenous libraries identify additional challenges, as only 46 of the 133 First Nations communities in Ontario have public libraries. Several school boards in small and rural communities do not have even partially-resourced school libraries. The socioeconomic profile of many rural and remote communities is such that people may not have access to the Internet or libraries, cannot afford to buy books or have geographical barriers to post-secondary education.

### How our overarching principles apply

**Equity** ensuring our services meet the needs of all; improving access with support

**Measurement** measuring library services context and member needs, measuring progress over time, indicators for success

OLA members working in these communities seek more effective ways to access OLA's programs and professional development opportunities. OLA will need to recognize the unique context of libraries in small or remote libraries, while addressing limitations to accessing member benefits. In current feedback, members and potential members reference a variety of barriers, including: travel costs to attend educational programs meetings; registration costs for professional development opportunities, and; a lack of staff resources to cover time away from work.

OLA's Indigenous Task Group is developing strategies and outreach to provide stronger support for First Nations, Inuit, and Métis populations. An expanded strategy would more appropriately serve the membership of the broader rural and remote communities.

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## **THE PATH FORWARD: GOALS AND OUTCOMES**

**GOAL 1:** Identify the needs and requirements of rural, and remote communities.

**GOAL 2:** Strengthen and maximize partnerships with other organizations and associations to minimize duplication of effort and maximize resources to these communities.

**GOAL 3:** Create a plan to focus greater support and service access for libraries of all types in smaller, rural, or remote communities, including Ontario's Indigenous communities.

## WHAT WILL SUCCESS LOOK LIKE IN THREE YEARS?

- **A rural, remote, and Indigenous communities plan is created and deployed.**
- **Libraries of all types (public, school, academic, health, special) in small, rural or remote communities have access to services tailored to their unique communities.**
- **More members from small, rural, and remote communities access educational programs, volunteer and engage in workshops and committees.**

## **Strategic Priority 5: Our Enablers to Success**

OLA's strategic plan requires a combination of enablers to achieve success: our people, technology, and fundraising.

### **THE PATH FORWARD: GOALS AND OUTCOMES**

**OUR PEOPLE:** OLA has an annual membership average of 5,000 members, a Board of Directors, six divisional councils, several committees, and a staff team; all of whom are needed to engage in our strategies and initiatives over the next three years. We are proud of our volunteers who contribute innovative ideas, approaches, and efforts to our committees, task forces, and planning groups. Our Board and staff are committed to focusing on what needs to happen to ensure continued traction on our plan.

**TECHNOLOGY:** OLA relies on technology to engage with members, to support operations and to connect members to each other. We will need to continually assess and upgrade our technology to best support our many initiatives and services across all domains.

**FUNDRAISING:** Since OLA's resources can only stretch so far; funding is a priority for the association. In 2016, the OLA Board approved a fund development strategy that will be critical to support new initiatives for research and strategic priorities. The progress we will make on several of the strategic plan's new initiatives will very much depend on resources flowing from fundraising.

### **WHAT WILL SUCCESS LOOK LIKE IN THREE YEARS?**

OLA will have the staff/volunteer expertise and competency and resources and systems in place to continue to provide pro-active programs and services that will continually strengthen the profession and library sector.



## **Thank You**

This plan would not have come to fruition if it were not for many people who provided a voice and their thoughts in its development:

**Our Members:** Thank you to all of our members for their assistance and feedback through town halls, surveys, and webinars.

**Board of Directors:** Thank you to the 2016 and 2017 OLA Board, who worked to understand the diversity of our members and the complexity of their needs. With our board's leadership and guidance, our strategic plan was able to be relevant, impactful, and forward-thinking.

**Strategic Planning Advisory Committee:** A special thank you to our Strategic Planning Advisory Committee (Todd Kyle, Leslie Weir, Alexandra Yarrow, Kerry Badgley and Maryse Laflamme) who provided invaluable information in the formation of this plan.

**Our Library Leaders:** A number of people in the library world recognized as leading professionals in a variety of library related disciplines and roles were interviewed for their specific viewpoints.

**Our Staff:** A special thank you to all OLA staff that provided a strategic voice and finalized the plan.