



To: SOLS Trustee Councils

From: Stephen Abram, executive director

Date: Oct. 15, 2014

**Subject: Report on FOPL Activities**

FOPL has been very active this year. The membership investments in research, marketing and advocacy on a collaborative basis are showing fruit at costs that would be unaffordable to individual library systems.

1. **Culture Development Fund Board Training**

We are building a four year learning cycle for members of library boards. This will involve updated print materials as well as video and e-learning components that target the key learning activities in each year of a board’s mandate.

The FOPL Board held a joint meeting with OLA/OPLA/OLBA to help steer this project.

Shelagh Paterson and I met and massaged the minutes (shared). We built a chart that sets out the priorities expressed by the team at this meeting. Some modules are to be built using the CDF funding and readings will be aligned with the board appointment cycle.

We have reviewed the new LearnHQ e-learning system at SOLS as the platform for this project and hope to launch the initial phase at Boot Camp at OLA Super Conference.

This project will continue the ‘*Leadership by Design’* and *‘One Place to Look’* brands.

1. **FOPL Statistics Project based on Ontario Ministry of Culture Data Collection**

FOPL now has 12 years’ worth (1998-2010) of the Ministry data that has been collected from Ontario’s public library systems. We have massaged it and it is in good database spreadsheets along with a validated list of library systems and contracting libraries.

A playbook is being built for the 1998-2010 data that we have and ranking tables are being assembled. The first report will cover 10 years (2001-2010) since that is the best data available at this point and the older data is wonky. It will be very interesting to review the rankings of libraries in this province by some standard measurements.

I have met with the Ministry staff to offer up some data point errors as well as to get the 2011 and 2012 data to add into our databank which is now expected for Dec. 2014.

We are development a “FOPL Index of Community Engagement” that will offer a straw-man that develops a new measurement for comparability among Ontario library systems that combines print and digital circulation, virtual engagement, gate-count, and programs. This is the Holy Grail and will take a lot of analysis.

A new proposal has been received by the Ministry from FOPL. In it we ask for more funding.

Full FOPL members will receive the orientation reports, rankings and insights only about a weekly cycle over the coming months. We are dividing it up since it is quite a bit to digest at this point. This is the first time the community has been able to access the data in open data format and perform these analyses. We will generate a lot of insights.

What FOPL and Dr. Molyneux have accomplished to date includes:

1. Worked with the Open Data Initiative files of the Ontario Public Library data collection from 1998-2010. We have clean data on 304 Ontario library systems that have reported for all ten years from 2001-2010 and have a good understanding of the data now. We are ready to ingest the 2011 and 2012 data when the ODI files are released (hopefully in December) and review the new fields that have been added. We have coded this well for further analysis and dealt with any data understanding or normalization issues. A phase 1 draft report has been prepared and is with the FOPL Board for review.
2. Developed a core list of measurements (usually on a per-capita or per-cardholder basis) to facilitate comparative research.
3. Built a draft phase one report ranking all libraries in Ontario as well as by size band and First Nations.
4. Developed some draft research insights, Top 50 lists and visuals. In particular we see opportunities in the area of public research as well as well as cardholders campaigns as part of our Branding research started with the 2020 funding from SOLS/OLS-North.
5. Developed ideas and proposals for Phase 2-3 activities outlined below.

What FOPL would love to do is this:

* Have Bob accomplish what is proposed in our original proposal to complete the research tasks:
* **Phase 2**
	+ Further develop per-capita analytics of the various cohort of Ontario public library systems in order to facilitate comparisons by size. We propose the development, and testing of a ***FOPL Community Engagement Index***. This would combine measure beyond ‘circulation’ and build models of hard and digital copy circulation, website and virtual activities, traffic and programming in Ontario’s public libraries. This is an exciting project with the prospect to move library data to useable comparisons that measure performance on a 21st Century basis and support data-driven management decision-making in libraries for boards, CEO’s and staff.
	+ Seek to build core comparisons of Ontario public libraries with datasets from those provinces that may have them (BC, AB, SK, NS, NB) and the U.S. dataset (which is cleaner and more normalized). We need to know how we’re doing beyond this province and in places where different funding and expenditure models may prevail.
	+ Build visuals (bar charts, pie charts, graphs, etc.) on the data with as much longitudinality as is possible without expensive data massage. This will make these data more accessible to the average person and library staff.
* **Phase 3**
	+ Find the ‘sound bites’ in the data that will empower public libraries through their CEOs, management teams, associations, and trustees to communicate the impact and role of the library in communities. Provide these to the ‘right’ news and communication vehicles as press releases, social media postings, visuals, events, and reports.
	+ Teach and train the community in the usage of statistics, measurements and other evaluation tools. To this end, FOPL proposes to develop a series of webinars for the community to learn how to better interpret and use the Ministry data as massaged by this project. We want to transfer measurement and analytical skills as well as build understanding of how to use the data to build strategy. We also want to start awareness building of the ***FOPL Community Engagement Index.*** Eventually we see that – after testing and communication – this could be a major benchmark for management of libraries to build effective community strategies in public libraries. In addition to the webinar strategy, we propose a **Summer Institute** at the iSchool of 3-4 days that builds capacity in understanding and using statistics in the public library sector.

I think that Bob’s work is just what our sector needs and it’s built on and adds value to the quality Ministry data collection. I also believe that it derives value for our sector and the Ministry from the strong, long-term investment in public library data collection.

1. **Ontario Libraries Capacity Fund**

You will recall that this is the $10 million innovation fund from the last two budgets that has now passed. FOPL was an invited participant in a face-to-face 3.5 hour meeting with the Minister of Culture, Michael Coteau, and senior Ministry staff to help plan the terms of reference and process, and priorities for this fund. It is expected to open in late 2014. Additional groups were consulted by teleconference. Michael Coteau spent almost an hour with us in the meeting.

1. **2020 Branding Project**

We have received the Phase 1, 2, and Phase 3 reports.

We now have a good idea of where Ontario libraries and library staff stand with respect to branding. Phase 3 accomplished some test interviews with municipal leaders.

It is now clear that we only know where libraries think they stand. The FOPL Research Committee recommended that we repeat the Market Probe study (with some additions based on the ideas in the Gates sponsored U.S. Pew studies) that we did in 2006 and 2010. This is essential before we proceed with a branding campaign as endorsed by the steering committee. We must get current data on the public’s perceptions and use of public libraries (and do the attendant analysis of any gaps / alignment with library staff perceptions). An RFP is being issued in October to accomplish a public opinion poll in early 2015.

1. **First Nations**

An orientation to First Nations issues and strategies was held for the association executive director team on Sept. 12th based on the First Nations Strategic Action Group (FNSAG).

1. **Training and Development**

FOPL members get preferred rates at the University of Toronto Faculty of Information iSchool Symposia. 3 have been done in 2014 with another scheduled on Makerspaces (<http://www.creativemaking.org>) for Oct. 6-7 2014 and another on 21st Century Organization Design on Nov. 13-14, 2014.

FOPL webinars on CASL are posted to the member’s section of FOPL.ca. A webinar on using the FOPL Statistics with insights from the report. One is envisioned for effective cardholder growth strategies. Two more will be on business services in libraries.

I spoke on advocacy (in French and English) at the OLS-North Conference in Subdury on Sept. 23-24.

1. **Repeating the 2006 and 2010 Market Probe Study in 2015**

We have identified candidate firms for an RFP and will issue the RFP in October. The FOPL Research Task Force has reviewed the survey instruments from our last two as well as the survey instruments used on the Pew Gates Foundation project in the U.S. They will review these with the successful bidder for polling to begin in 2015.

1. **Anti-Spam Opinion**

In a separate e-mail FOPL members have received FOPL’s CASL (Canadian anti-spam Legislation) legal opinion. A small team of us met with the lawyer and briefed her on the public library environment. We developed a model library policy based on this opinion. I think that this opinion and policy are quite comprehensive!

A webinar with Maanit Zemel was held on Sept. 17, 2014 from Noon-2 pm. We allowed plenty of time for questions and responded to each on the member’s only website.

1. **Libraries 2025 Summit Planning Team**

The executive directors of FOPL, OLA, SOLS, OLS-N and CULC met to start envisioning a Libraries 2025 Summit to repeat the success of the 2020 Summit that eventually delivered $18 million in additional public library funding. The date is next spring (probably April 29-30) and the hotel is the Royal York. There will likely be 300-350 people expected to attend this event.

This will be a repeat of the Libraries 2020 summit that resulted in the 4 priorities for the past few years as well as the $18 million in funding from the province. It will be funded by the remaining funds in that money at SOLS/OLS-N.

1. **A Day at Queen’s Park (Nov. 26, 2014)**

Impact Public Affairs (Toronto Office) and Huw Williams have been engaged by OLA to organize a Day at Queen’s Park on Nov. 26-7 with targeted meetings with the new government and senior civil servants. Impact Public Affairs Ottawa operations organized the very successful Day on the Hill in Ottawa for CLA that focused the messaging, trained the ‘librarian’ and ‘trustee’ participants in lobbying/advocacy and resulted in hundreds of touch-points in 2 days.

FOPL is partnering with OLA on this project and we will be helping to lead the charge on public library advocacy as OLA focuses more on school libraries and the college sector.

1. **Provincial Election Follow-Up**

I have sent warm congratulations to Premier Wynne, Minister Chan, Minister Coteau, and (Culture) parliamentary assistant Sophie Kiwala, MPP on behalf of FOPL. I shared these with members and suggested that they all might want to send quick notes to ‘our’ folks. I focused on the role of public libraries and the $10 million fund in the provincial budget that just passed. (Letters attached)

I’ve spoken with ‘our’ civil servants and checked out the lay of the land in this ‘new’ majority government. We have read the mandate letters from Premier Wynne to all of her ministers and use these to help plan our Queen’s Park activities.

1. **Coordination Meetings**

We continue to make great progress on coordinating with the other associations and agencies in Ontario that reflect the needs of public libraries. OLA, SOLS, OLS-N, CULC and FOPL meet at least quarterly and we make sure to harness our energy and funds to ensure the biggest impact for our sector.

I have met with AMPLO and ARUPLO.

1. **FOPL Member Recruitment**

As a nice side benefit of the statistics project we have a great up-to-date list of library systems in Ontario (edited for those that contract with other libraries) as well as their sizes, budgets, etc. Monica Mixemong is now analyzing this to review FOPL’s market penetration and figuring out where we can target a new member recruitment campaign in the autumn.

We will decide the nature of member benefits, member-only benefits, and the benefits that accrue to full and associate members now that we have the statistics reports available and the coming consumer research.

1. **Ministry Update**

Deputy Minister Stephen Davidson has left and is moving on to be DM Policy and Delivery at the Policy office of cabinet. The new Deputy Minister of Culture is Drew Fagan (He came from Seniors and Infrastructure) and this takes effect Oct. 6, 2014. Kevin Finnerty is still our ADM for culture and libraries.

Progress is being made. Monica and I are only committed to FOPL work for about 12 days per month each so progress isn’t as fast as we’d like but we are making progress.

As always, I’m just at the end of the phone or e-mail if you have any questions, comments, or suggestions.

Cheers,

Stephen

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