ONTARIO PUBLIC LIBRARY CAPACITY AND EMERGING LEADERSHIP: RESEARCH SUMMARY AND RECOMMENDATIONS

FOPL Library People Capacity Working Group

PHASE II Project Report
December 2019

EXECUTIVE SUMMARY

Throughout 2019, the FOPL People Capacity Working Group conducted research with members of the FOPL network to assess the state of leadership development in Ontario public libraries and identify opportunities to support succession at the CEO level. This need was identified based on anticipated transition of CEOs out of the workforce within the next 5-10 years (based on demographic data).

CEOs overestimated interest in the CEO position from Emerging Leaders. They indicated that internal emerging leaders, for the most part, required between one and five years development towards the CEO role. Relatively few CEOs have a succession strategy in place, and many were unclear whether their board would be willing to invest in the development of a CEO candidate if they were not already fully qualified for the role. When asked to identify development needs, CEOs felt Emerging Leaders particularly needed to enhance their competencies for 'HR Management', 'Budgeting and Finance', 'Strategic Planning', and especially 'Emotional Intelligence' and 'Political Acumen'. Emerging leaders identified fewer gaps in their development, but agreed that 'Political Acumen' and 'Strategic Planning' were areas of focus. Both groups surveyed identified 'Emotional Intelligence' as the most important competency for CEOs and 'Promotion of a Diverse Workforce' as the least important. The CEOs indicated that the responsibilities that absorbed most of their time included predominantly internal, functional tasks including finance, HR and operations management, rather than outward-facing, strategic responsibilities such as board or municipal management or community development. The majority of survey responses came from libraries service populations between 5,000 -15,000 people.

When asked about benefits as motivational factors, Emerging Leaders indicated that their highest priority was a 'Higher Salary', demonstrating a gap in CEO's perceptions; CEOs thought the opportunity to work for a 'Forward Thinking System' would be the top motivation for Emerging Leaders. There was also a slight gap in preference for organizational culture, with CEOs preferring a 'Fair and Equitable' work culture, compared to the Emerging Leaders who identified a 'Flexible and Accommodating' workplace as their preference. While intangible benefits (e.g. flexible schedules, professional development) were valuable to both groups, they were more highly valued by Emerging Leaders than CEOs as a motivating factor.

Based on an analysis of this data, the People Capacity Working Group recommends several outcomes for the next years of the group's mandate. These include:

- The development of a talent development toolkit to provide resources to address leadership development, performance management, staff engagement and other topics identified by CEOs
- A sector leadership summit to develop a strategy for mentorship, networking and ongoing support for developing leadership capacity
- Collaboration with other provincial library agencies and associations to identified and deliver learning and development opportunities identified by library CEOs and explore the potential for a skill exchange program
- Build consensus across sector agencies on a set of universal leadership competencies to guide future professional develop
- Develop a roadmap and communication strategy to identify and promote existing leadership development programs, as well as professional development funding opportunities

CONTENTS

1.   BACKGROUND

The Human Capacity Working Group was established in 2018 with a mandate to establish professional training and development to Ontario's public libraries, in the context of the broader role of FOPL. This focus is critical to support FOPL's priorities of ensuring human resources capacity in the sector is prepared for the challenges and opportunities facing libraries in the next decade. Since its formation in 2018, the working group has engaged in research to understand the current content of professional development throughout member libraries. The working group has focused its research on understanding where it can add value through professional development opportunities through an exploration of the following:

- What are the professional development needs of libraries specifically with respect to leadership?
- What capacity do libraries currently have for leadership development and succession?
- What is needed to build capacity for the sector over the next 5-10 years as current leaders' transition out of the profession?
- What can we understand about the motivations and priorities affecting emerging leaders, and how can we address this through succession and leadership development?

The working group approached this work through a phased approach to align with each year of the working group's mandate, including the projected extension of the working group's term:

PHASE I: Research
PHASE II: Analysis & Recommendations (current phase)
PHASE III: Development
PHASE IV: Implementation
PHASE V: Evaluation
PHASE VI: Recommendations for Further Development

The research conducted in Phase I of this project included surveying both CEOs and their identified 'Emerging Leaders' of member libraries (see METHODOLOGY). This research was conducted in 2018 and presented at the 2019 OLA Superconference.

2.   PURPOSE

This report summarizes Phase II analysis of the research conducted by the Human Capacity Working Group. Based on the data collected through this survey, the working group has identified a number of recommendations for development in Phase III of the working group's mandate. These recommendations are presented to the Executive Director, FOPL for approval.

3.   METHODOLOGY

A survey of 14 questions was issued to the FOPL network. CEOs were asked to distribute the survey to individuals they identified as Emerging Leaders (ELs) – high potential individuals at any level of the organization. The questions related to competencies ELs identified as necessary for leadership roles, which competencies they felt they possessed, and which they felt they needed to develop. Additional questions focused on priorities with respect to benefits (both compensatory and intangible) that factor into their career development goals. There was approximately 300 responses to the survey.

A second survey was issues to the CEOs themselves. This survey featured 26 questions – most of the questions reflected what was asked of the ELs with the intent of providing a comparison between the two groups. Several demographic questions were added to understand the current leaders in the province's libraries. Over 80 CEOs responded to the survey, representing approximately one quarter of the libraries in the province.

4. FINDINGS

4.1 DEMOGRAPHICS

Emerging Leaders
Approximately 300 Emerging Leaders responded to the survey issued in March 2018. When asked about their current role at their library, the majority indicated that they were management staff ((56.73%) including Branch/department Managers, Senior Managers, Directors/Deputy CEOs or CEOs), as opposed to 43.27% who indicated that they were Librarians or Supervisors/Coordinators. A strong majority of these individuals held an MLIS (63.67%).

CEOs
The CEOs were asked to specify the size of the community their library served. The most frequent response was 5,001-15,000 (29.89%), with 20.69% of the responses coming from CEOs of libraries serving populations greater than 100,000. Only 37.93% of these libraries are unionized. 58.54% of these CEOs report holding an MLIS, and 57.80% worked in a system that required this degree for the CEO position.

The CEO survey asked for demographic information that was unfortunately not included in the survey for ELs. These questions revealed that 85% of the CEOs surveys identify as female. The largest age group represented amongst survey respondents were 'Baby Boomers' born between 1946 and 1964 (45.98%), followed closely by 'Generation X' born between 1965 and 1982 (44.83%). The vast majority of CEOs identified as white (93.1%).

4.2 COMPETENCIES

Top Competencies for the CEO Role
Both ELs and CEOs were asked to identify what they believe to be top competencies required for the CEO role. There was consensus between the two groups that the most important competency is 'Emotional Intelligence', although this competency was ranked higher by ELs than by CEOs

(84.19% for ELs; 75.58% for CEOs). While there was overall a similar ranking between the two groups, the gaps in reported importance for each competency is significant, with ELs underestimating the importance of several competencies as compared to the CEOs.

CEOS		ELs	
Emotional Intelligence	75.58	Emotional Intelligence	84.19
Strategic Planning	65.12	Strategic Planning	80.41
Political Acumen	43.02	HR/Workforce Management	64.95
Finance & Accounting	58.14	Political Acumen	45.70
HR/Workforce Management	55.81	Stakeholder Management	45.36
Stakeholder Management	43.02	Finance & Accounting	39.52
Media Relations	17.44	Promotion of a Diverse Workforce	35.74
Promotion of a Diverse Workforce	13.95	Media Relations	26.80

*highlight denotes >10% gap

Top Competencies of CEOs and ELs: Self-Reporting
When asked to rank on their own competencies, there was variation between the two groups. The ELs overall ranked their own competencies almost universally lower than the CEOs, particularly on competencies related to 'hard skills' such as 'Finance' and 'HR Management', and 'Operations Management'. Again, both groups rated 'Emotional Intelligence' as their strongest competency.

CEOs		ELs	
Emotional Intelligence	77.65	Emotional Intelligence	82.76
Team Leadership	76.47	Team Leadership	69.31
Operations Management	75.29	Promotion of a Diverse Workforce	43.45
Strategic Planning	67.06	Strategic Planning	41.38
HR/Workforce Management	57.65	Operations Management	39.31
Finance & Accounting	56.47	HR/Workforce Management	28.97
Stakeholder Management	45.88	Finance & Accounting	21.72
Political Acumen	43.53	Stakeholder Management	20.00
Media Relations	21.18	Media Relations	29.31
Promotion of a Diverse Workforce	20.00	Political Acumen	14.83

CEOs: Where do you spend your time & most important priorities?
The CEOs were asked additional questions about what aspects of their role are most time consuming versus most important. There was near exact alignment between these responses, indicating that CEOs are spending time proportionate to the relative importance they assign to various responsibilities. However, when contrasted with how CEOs ranked the competencies for

their role, there are interesting discrepancies whereby CEOs ranked competencies required for the most important tasks relatively low. The time spent on various responsibilities are distributed closely amongst the top four responsibilities including 'HR Management', 'Finance and Accounting', 'Planning' and 'Operations' – all internal functions – whereas less time is spent on external/community facing functions including 'Partnership Development and Community Engagement', 'Municipal Relations', 'Board Management' or 'Fundraising'.

Most Time Consuming	Score	Most Important	Score
Human Resources	6.92	Human Resources	6.76
Budget/Finance	6.65	Budget/Finance	6.68
Operations Management	6.80	Planning	6.37
Planning	6.27	Operations Management	6.33
Board Management	5.61	Board Management	5.23
Partnership/Community Development	4.60	Partnership/Community Development	5.17
Municipal Relations	4.34	Municipal Relations	4.89
Fundraising	3.00	Fundraising	2.51

Areas of Development for Emerging Leaders
ELs were asked to self-identify competencies they feel they need to develop. CEOs were asked a complimentary question to identify the competencies they believe their ELs need to develop prior to succeeding to CEO positons. While there was overlap between the development needs the two groups identified, the CEOs reported more significant development needs than the ELs identified for themselves. There were also some significant gaps on several competencies where the CEOs responded dramatically higher than ELs, including 'Emotional Intelligence', 'Political Acumen', 'HR Management', 'Team Leadership' and 'Finance and Accounting'. Overall, the ELs identify as needed far less development than the CEOs believe they need.

CEOs		ELs	
Political Acumen	65.05	Strategic Planning	53.68
Finance & Accounting	55.42	Political Acumen	46.32
Emotional Intelligence	53.01	Stakeholder Management	43.51
HR Management	53.01	Finance & Accounting	42.11
Strategic Planning	53.01	HR Management	40.35
Team Leadership	45.78	Operations Management	37.54
Operations Management	43.37	Team Leadership	35.79
Stakeholder Management	42.17	Media Relations	29.47
Media Relations	24.10	Emotional Intelligence	17.89
Promotion of a Diverse Workforce	12.05	Promotion of a Diverse Workforce	9.82

*highlighting denotes >10% gap

4.3 BENEFITS & WORK CULTURE

The second major area of inquiry for this survey was to assess the motivations of ELs, including the factors that contribute to job satisfaction, mobility within the sector and job selection. A number of questions were asked to assess the current state (i.e. what benefits do libraries currently offer), the priorities of EL (both self-identified and perceived by the CEOs). Further, questions related to organizational culture were asked of both the CEOs and ELs to assess if there are gaps in perception related to the current workplace culture of libraries and whether the two groups share the same preferences and priorities with respect to work culture.

What are ELs Looking for in their Career? Top Attraction Factors
ELs were asked to rank their top priorities when considering career advancement. CEOs were asked a complimentary question to rank what they believe the EL's priorities are. This questions was asked to identify factors in recruitment and retention as it relates to leadership development. There were several gaps between the priorities identified by ELs and those assumed by the CEOs.

*highlighting denotes >10% gap

CEOs		ELs	
Good Salary Structure	50.00	A forward thinking system known for doing exciting things	49.48
A forward-thinking system known for doing exciting things	46.51	Location/Reasonable Commute	45.67
Opportunities to work on interesting projects	47.67	Opportunities to work on interesting projects	41.18
Opportunities for further career advancement	38.37	Ongoing professional development	32.18
A great boss/CEO	37.21	A system with a good reputation	30.45
A system with a good reputation	34.88	A great boss/CEO	29.76
Location/Reasonable Commute	35.56	Good Salary Structure	29.07
A well-funded library	27.91	Opportunities for further advancement	26.64
Ongoing Professional Development	24.42	A well-funded library	20.76
A system with new resources	9.30	A system with new resources	9.00

Current Benefits
When asked what benefits are offered in their system, the most common response was 'Professional Development Opportunities' (82.76% of CEOs and 77.18% of ELs report that their current system provides professional development as a benefit). Other common benefits included 'Flex Schedule' (50.57% CEOs, 39% ELs), the ability to 'Bank Lieu Time' (54.02% CEOs and 41.49% ELs), the ability to 'Work from Home" (29.89% CEOs and 12.45% ELs) and 'Mentorship Programs' (12.64% CEOs and 9.96% CLs). 4.6% of CEOs and 6.64% of ELs identified that their system offered no benefits.

When asked to rate overall how important benefits such as these are, both CEOs and ELs felt benefits were important, though the emphasis on their importance varied slightly. Slightly more ELs that CEOs felt these benefits were 'must haves' (14.95% vs 12.64%), and overall, ratings of

'very important" and 'important' were both higher for ELs that CEO. 23.35% of CEOs rated these benefits as 'somewhat important' (more CEOs rated these benefits 'somewhat important' (23.53%) that the stronger rated 'important' (21.18%)), compared to 9.38% of ELs. In other words, while both groups felt benefits were an important consideration for their own career choices, ELs valued these benefits higher than did CEOs.

Top Priorities: Benefits

When asked to rate the importance of a range of benefits overall, there was some interesting gaps between the most important benefits for CEOs verse the ELs. 'Workplace Culture' was comparable in importance between the two groups (45% for ELs vs 40.23% for CEOs), as was 'Vacation' (35.63% for CEOs vs 29.58% for ELs). 'Flexible Work Schedules' were more important to CEOs (59.77%) than ELs (50.83%) which would seem to contradict findings elsewhere that flexibility in the work culture was more important to ELs than CEOs (*See Organizational Culture*, below). 'Salary' was a significantly more important factor for ELs than CEOs (62.92% for ELs vs 50.57% for CEOs). However, the most significant gap was the importance of 'Remote Work Options' (42.50% for ELs compared to 19.54% for CEOs). Having said this, 'Remote Work Options' was not the top priority for either group. The most important benefits for current CEOs was 'Flexible Schedule', compared to 'Higher Salary' for ELs. A further 19.17% of responses was attributed to 'Other', most of which was identified as professional development opportunities.

CEOs were also asked what they believed to be the most important benefits to ELs. This questions was asked to assess the extent to which the importance of benefits were understood by CEOs, which could provide some insights into opportunities for talent management, particularly recruitment and retention, for ELs across the sector.

CEOs		ELs	
Flexible Schedule	81.18	Higher Salary	62.92
Higher Salary	65.88	Flexible Schedule	50.83
Better Work Culture	52.94	Better Work Culture	45.00
Better Vacation Allotment	35.29	Better Vacation Allotment	29.58
Remote Work Options	31.76	Remote Work Options	42.50

The CEOs ranking suggests that CEOs assumed ELs held the same order of priority for these benefits as they identified for themselves, which was mostly accurate other than 'Higher Salary' and 'Flexible Schedule' being reversed in order for the ELs. However, in the case of 'Flexible Schedule' the CEOs dramatically overestimated the importance for the ELs (81.18% assumed importance for CEOs vs. 50.83% reported importance for ELs), and also overestimated the importance of 'Better Work Culture" (52.94% vs 45%). At the same time, they underestimated the importance of 'Remote Work Options' (31.76% vs 42.50%), though they correction assumed it was the least important of the five types of benefits listed.

When asked if they were satisfied with their current benefit structure, a strong majority of ELs indicated they were (74.48%).

Organizational Culture

Both CEOs and ELs were asked to identify terms that described their current work culture, as well as their preferred work culture. There were significant variations in responses between the two groups, indicating either that CEOs and ELs were reporting from different systems or that the two groups experience their organizational culture differently. There was agreement between the two groups in assessing their organizational culture as 'Learning Oriented' and 'Innovative', however.

Current Work Culture

CEOs		ELs	
Fair and Equitable	72.09	Flexible and Accommodating	49.38
Flexible and Accommodating	68.60	Learning Oriented	47.30
Fun and Collegial	43.15	Policy Oriented	46.47
Learning Oriented	50.00	Innovative	45.23
Innovative	48.84	Fun and Collegial	43.15
Policy Oriented	29.07	Fair and Equitable	41.49
Risk Adverse	8.14	Risk Adverse	23.21
Workaholic	4.65	Lacks Leadership	17.01
Culture of Blame	4.65	Culture of Blame	15.77
Looking for New Job Because of Culture	4.65	Workaholic	14.62
Lacks Leadership	2.33	Looking for New Job Because of Culture	6.64

*highlighting denotes >10% gaps

Ideal Work Culture: Comparative

The CEOs and ELs were also asked to rank the qualities they feel describe their ideal work culture. While there was some general consistency with the ranked priorities of the two groups, there were some areas where the gap in importance between the various factors was significant.

CEOs		ELs	
Fair and Equitable	80.46	Flexible and Accommodating	85.54
Innovative	75.86	Learning Oriented	80.58
Flexible and Accommodating	74.71	Fair and Equitable	80.17
Learning Oriented	73.56	Innovative	79.75
Fun and Collegial	63.22	Fun and Collegial	79.34
Strong Leadership and Direction	62.07	Strong Leadership and Direction	77.69
Willing to Take Risks	52.87	Willing to Take Risks	65.7

				0
Clear and Focused	51.72		Clear and Focused	62.40
I work in an Ideal Culture	19.54		Policy Oriented	17.36
Policy Oriented	16.09		I Work in an Ideal Culture	12.81

*highlighting demotes >10% gap

Ideal Work Culture: Perceptions of EL Priorities
The CEOs were further asked to identify what they believed were the most important elements of work culture to the ELs. The assumptions of the CEOs are largely consistent with how the ELs rated the relative importance of the various aspects of organizational culture, with the exception of factors related to 'Innovation', 'Fun' and 'Risk Orientation', the importance of all of which was significantly underestimated by the CEOs.

CEOs		ELs	
Fair and Equitable	80.23	Flexible and Accommodating	85.54
Flexible and Accommodating	77.91	Learning Oriented	80.58
Learning Oriented	77.91	Fair and Equitable	80.17
Strong Leadership & Direction	73.26	Innovative	79.75
Innovative	68.60	Fun and Collegial	79.34
Clear and Focused	53.49	Strong Leadership and Direction	77.69
Fun and Collegial	52.33	Willing to Take Risks	65.70
Willing to Take Risks	47.67	Clear and Focused	62.40
Policy Oriented	13.95	Policy Oriented	17.36

*highlighting denotes >10% gap

4.4 GOALS

The last set of questions offer insight into progression goals for ELs. First, the CEOs were asked whether they had internal candidates suitable for progression into the CEO position, and if so, how much development would this candidate require prior to being able to transition into this leadership role. 20.24% of CEOs indicated that they had no potential internal candidates. 15.48% indicated they would require greater than 5 years development. The majority of CEOs felt they had an internal candidate who would be prepared for a CEO role in 1-3 years (28.57%) or less (10.71%). The overall majority however indicated that internal candidates required further

development, whereas only 8.33% indicated there was a candidate currently prepared for the role.

However, only 22.09% of CEOs indicated that they had a succession strategy in place to prepare to turnover at the leadership levels of their organization. A further 24.42% indicated that they have informally identified internal talent, and 15.12% indicated that succession plans were 'In Development'. However, the most common response indicated there was no succession strategy for their library (38.37%).

Further, when asked if they believed the Board would be willing to hire a CEO who required further development for the role, only 33.72% indicated that their Board would prefer to develop talent at the CEO role. At the same time, only 11.63% believed their Board would only hire an experienced leader. 44.19% of CEOs did not know, and an additional 10.47% percent believed the Board would invest to only a limited extent to the development of a CEO.

With respect to the MLIS, the majority of CEOs indicated that this degree was required for their position (58.54%), but slightly fewer (57.50%) felt that the MLIS should be required for their position. 63.67% of Emerging Leaders hold the MLIS.

There was a gap in perception about the ambitions of the ELs. When asked if they believed they had an EL who desired to become a CEO, 62.07% of CEOs reported they did. In reality, only 40.36% of ELs expressed a desire for this role. This figure was actually lower when ELs were asked to define their career ambitions, where only 33.46% indicated their ambition was to be CEO. A further 39.16% expressed interest in becoming a Senior Manager or Director, and 14.07% desired to be a Manager.

5. ANALYSIS

Implications for Succession Planning
While the focus of this research presumed that the impending retirement of CEOs would create a succession challenge for many libraries, less than 10% of CEOs were planning to retire imminently (i.e. within 1 year). The majority of CEOs were either new in the role (less than 1 year) or planning to continue in their current role for up to 10 years (55.56%). However, 44.44% of CEOs who responded to the survey indicated that they would be transitioning out of their role within 5 years or less. Only 18.82% of CEOs had a Deputy CEO position, traditionally a path of progression in many libraries, and only 22.09% had a succession strategy for their position. 35.72% indicated that they either lacked a potential internal successor or that this individual required more than 5 years development before being capable of the CEO position. Further the majority of CEOs cannot confidently expect their Boards to be willing to invest in developing CEOs. The majority of CEOs indicated uncertainty about where their Board stood on the issue (44%). This suggests that there have been insufficient attention paid to the issue of succession, particularly when the majority of CEOs in this survey indicated they were within 5 years of retirement. Efforts to educate board members on professional development and recruitment for CEOs also becomes significant. There is broad consensus amongst HR professionals about the importance of hiring for a growth mindset, and given that many ELs will have less experience

in their leadership roles than previous generations of CEOs, it will be particularly important for boards to understand the importance of leadership development and talent management.

Further, this study appears to indicate that CEOs are overestimating their internal capacity for succession, which almost twice as many CEOs indicating that they believe they have a willing internal candidate as ELs expressing interest in this position. This could be due to a number of factors. First, the gaps in priority of benefits could indicate that challenges in attracting and managing talent. 62.92% of ELs indicated that 'Higher Salary' was a priority (the top priority overall) which could present challenges for recruitment in CEO opportunities are not compensated to the extent that meets the expectations of the ELs. Further, many of the intangible benefits ELs identified as motivating priorities may not be available, particularly at smaller systems (i.e. flexible scheduling, remote work options).

CEO Competencies & Responsibilities for the Role
Understanding of the CEO role may be a factor in the succession issue. The majority of CEOs who participated in this survey report that internal, operational functions or both more important and more time consuming than external and strategic functions. This may be a function of the number of smaller systems represented in the results where the CEO is likely to be directly responsible for performing the professional functions of the system. It is worth further investigation into whether there is an accurate understanding amongst ELs as to what the nature of the CEO role entails. Further, ELs ranked themselves relatively low in 'HR Management', 'Finance', 'Stakeholder Management' and 'Political Acumen' which are typically associated with the CEO role. This could indicated that ELs feel unprepared for the hard skills of the CEO role. It would be a possible area of further inquiry to understand better whether the ELs have an accurate view of the CEO role and if not, would such an understanding improve their interest in progression to this position.

The CEOs responses to the questions about how they allocate their time are also revealing. More time is spent on functional tasks such as 'HR' and 'Budget' than on either 'Municipal Relations', 'Partnership or Community Development' or 'Board Management'. This may be a reflection of the realities of smaller library systems which were more fully represented in the survey. These functions of the CEO role require competencies that CEOs and ELs both felt ELs needed to develop, particularly 'Political Acumen'. 'Political Acumen' was the competencies CEOs also ranked as one of their own least well developed competencies (8th out of 10). It would be valuable to understand how the role of the CEO varies in systems of different sizes to better understand the nature of these gaps. It is possible that CEOs are underprepared in this competency because it is less relevant in smaller library environments, or if, due to the lack of comfort with their own skills in this area, CEOs focus less on aspects of their role that require this competency.

Cross-Sector Mobility for ELs
The issue of the CEO role has important implications for succession across the sector, potentially impacting the mobility of ELs. If skills and competencies required for CEOs roles differ depending on the nature of the library, this may impact the opportunities for ELs from smaller systems assuming CEO positions at larger libraries (and vice versa). For example, the CEOs competency with budgeting and HR management will look different in systems where professionals with those specific specializations

manage these functions, as opposed to systems where these are the direct responsibility of the CEO themselves. If CEO, and leadership competencies generally, are not scalable across different system contexts, it will prove more challenging for the attraction and development of talent across the sector and will require a change in emphasis on leadership development.

The issue of mobility of leaders across the profession is also a significant consideration given the emphasis on 'Location/Reasonable Commute' as a primary motivation for ELs. 'Location/Reasonable Commute' was one of the most important considerations in career choices for ELs. CEOs underestimated the importance of this priority (32.56% vs 45.67%), but this is consistent with research on generations in the workforce and the importance of work-life balance for younger generations of workers. While this is not directly indicated in this study, recognizing that CEOs are younger than previous generations, it is reasonable to deduce that family obligations for CEOs and ELs are different than for their counterparts from previous generations, and mobility may be reduced as a result. If ELs have limited ability to commute, they will also have reduced options for their career development in different systems in more distant communities. This is a factor for consideration in succession management where it will be important to provide opportunities for engagement and development when there are few opportunities for advancement internally.

Implications for Professional Development
In looking at the ELs self-assessed competencies versus that of the CEOs, the largest gaps related to 'hard skills' including 'HR Management', 'Finance' and 'Operations Management'. This could be accounted for by CEOs being more experienced in these areas either by virtue of these being considered CEO functions in many systems or because they have had more experience in these areas in general. ELs identified their stronger competencies as including "Team Leadership" and "Emotional Intelligence" where they rated themselves on these competencies almost at par with the CEOs self-assessments. ELs felt that they had much stronger competencies with both 'Media Relations' and 'Promotion of Diversity' than the CEOs. These findings have implications for leadership development. If CEOs are learning the skills of the functional aspects of their role through experience, ELs will need professional development to build this skill set. If system provide professional development support for CEOs to gain these skills because they are directly responsible for these functions, than there needs to be some consideration paid to succession to ensure that ELs identified internally are provided exposure to these competencies in preparation for their advancement. Otherwise boards and recruiters should consider that many high potential ELs cannot be expected to have experience or training in these areas. Again, the caveat about these functional areas is that the expectations for the CEOs expertise in these areas may differ depending on the context in their system.

Both ELs and CEOs identified development opportunities for the ELs including these functional skills, especial 'Finance' and 'HR Management'. However, 'Strategic Planning' was a priority area that the ELs in particular singled out for their development, along with 'Stakeholder Management' and 'Political Acumen'. The CEOs also identified 'Emotional Intelligence' as areas of development for the ELs, though they did not identify this gap for themselves (53.01% vs 17.89%). The implication of this for development is that there seems to be a significant identified gap in a range of areas. In considering the current landscape of professional development and leadership programs available to ELs, there may be an opportunity for multiple programs to work as compliments, each with a different area of focus.

Given the issue of transferable skills across different types of public library, there may further be an opportunity to identify which niche each of these programs address, and to recalibrate around to the promotion of these programs for talent management opportunities across the sector.

Diversity & Inclusion
The competency 'Promotion of a Diverse Workforce' was ranked low for both ELs and CEOs, both in terms of their self-assessment (though ELs self-identified much stronger with this competency than CEOs – 43.45% vs 20.00%), and in terms of a priority by CEOs (12.05%). This prioritization may be in part a function of the communities libraries serve – less diverse communities may identify this as less possible, let alone important. However, given than over 90% of CEOs who responded to the survey identified as white, it may also indicate a blind spot in a the sector. There is substantial research about the importance of diversity in the workforce, indicating that diverse organizations achieve 35% more towards their outcomes than homogenous environments. For employees who are racialized or marginalized on the basis of gender, sexual orientation, ability or other factors, inclusion amongst the professions' leaders is critically important, and as libraries increasing turn outward towards embracing community development, it will be important for communities to see themselves reflected in their library. It will also be important for the sustainability and growth of the profession that diverse individuals see librarianship as a viable professional option, and diversity amongst the industry's leadership is critical to attracting diverse high potential candidates to the profession. In First Nations libraries, this is an acute issue since Indigenous people are underrepresented in the profession. This issue is particularly important to address in collaboration with library schools to address barriers to entry and the impact of the MLIS requirement on diverse talent attraction.

Implications for the MLIS
The findings about the MLIS indicates that while it is not universally required, it is still held by a majority of CEOs. Over two-thirds of the ELs who responded to the survey held the degree, and slightly less than 60% of CEOs did. It is interesting to consider this requirement in the context of what both groups identified as competency gaps for ELs. The MLIS does not provide training in HR or budgeting, nor should it as this is the base qualification for librarians, not specifically library CEOs. However, if credentialed librarians are the main talent pool for library CEO positions that it is clear that the degree alone is not sufficient training for leadership positions. While this is self-evident, it does present considerations for what professional development is recognized as appropriate or necessary for leaders in the sector, particularly if ELs aspiring to the CEO position do not have access to training or practical experience in areas critical to that role whilst in their current positions.

Factors of Workplace Culture
Other considerations from this study related to organizational culture. Both CEOs and ELs expressed that 'Innovation' was central to their ideal work culture, and both groups rated their existing systems as high in this competency. Risk tolerance, the absence of blame and a learning orientation are critical to innovation and while both groups perceived their workplace as being oriented to learning, there was a significant gap in how 'Risk Tolerance' and 'Culture of Blame' was perceived by ELs vs CEOs. There may be opportunities to address this gap through development opportunities focused on risk assessment, fail culture and how CEOs can encourage a learning mindset.

Another gap was how 'Policy Oriented' each group found their organizational culture to be. 29.07% of CEOs identified this as a factor in their organizational culture, compared to 46.47%. This may be worth further consideration for libraries since neither group identified 'Policy Orientation' as attractive in a work culture (16.09% for CEOs and 17.36%). A 'Fair and Equitable' culture, however, was very important to both and one area of exploration may how fairness and equity is understood within organizations and how this interplays with another important factor, "flexible and accommodating". While more CEOs than ELs identified that they worked in an ideal culture (19.54% vs 12.81%), it is interesting to note that 80% of CEOs by implication feel their culture could be improved. Organizational Culture is within the span of control for organizational leaders so this may indicate opportunities to focus on learning and development for CEOs to manage culture change.

Opportunities for Further Investigation
Some opportunities to further the understanding of human capacity in libraries may include:
- The nature of the CEO role across libraries of different size/context; cross tabulation of competencies by library size to determine if there are differences
- Why only a minority of ELs indicated an interest in CEO positions
- How board members would rank critical competencies for the CEO positons
- Awareness of and opportunity to access professional development opportunities for ELs in the sector

6. RECOMMENDATIONS

The Human Capacity Working Group further surveyed the FOPL CEOs to test a possible solution of creating a toolkit to support leadership development.

Based on the findings and analysis from PHASE II of this project, the working group is recommending several options for further consideration. When asked if such a toolkit would be helpful, 92% agreed it would. The topics identified for inclusion in this toolkit included:

- Leadership Development (5.0)
- Training & Skill Building (3.96)
- Staff Engagement (3.61)
- Performance Management (3.46)
- Succession Management (2.88)
- Recruitment (2.43).

The CEOs offered additional insights for development opportunities, including the following:

- Sector-wide secondments/ talent exchange program
- Cultural Competency Education
- Affordable and accessible networking and training opportunities for rural or remote systems
- Learning and development opportunities focused on the practical skills for the CEO role
- Mental health awareness training
- Mentoring and networking opportunities

- Library specific training on municipal leadership
- Training on CEO-Board relations
- Training on community development work
- Succession planning
- Training for library board members on recruitment and development of CEOs
- Coaching skill development

This feedback provides several directions for further development. Based on the research from Phase II of this project, the committee is recommending the following opportunities, for Phase III of the project:

1. *Talent Management Toolkit*
   This toolkit would include materials focused on various elements of the Talent Management process – recruitment, performance management, succession planning, employee engagement – to provide a starting point for systems to develop a more systematic approach to professional development of staff and ELs.

2. *Leadership Development Summit*
   In 2018, SOLS began work planning a library leadership summit that was not realized due to funding limitations. However, in the planning, several emerging issues were identified that have an impact on the future leadership of the sector. Some of these issues included: inclusion, mental health and leadership, character leadership, employee experience, the role of the 'soft middle' (ie middle management), millennial readiness for leadership, values-based organizational leadership. An opportunity to explore these topics would be valuable as part of a broader attempt to create a sector-wide understanding of leadership competencies for the CEO role. A Leadership Summit, with invitees who have participated in existing leadership development programs, would be an opportunity to address some of these topics and co-create a path forward.

3. *Public Library Leadership Competencies*
   Currently, different agencies and associations have adopted different leadership competency frameworks to support their professional development initiatives for leaders in the sector. A committee representing the provincial associations will collaborate to build consensus on a standard for Ontario Public Library Leadership Competencies for adoption across the industry.

4. *Roadmap for Professional Development Opportunities*
   This could be developed and embedded in the Toolkit, and would be an opportunity to inventory all the existing leadership programs, identify their unique value to the sector and develop a roadmap for prospective participants. In order to showcase what professional development is available to the sector, an awareness strategy could be development to succinctly provide an overview of this information. As part of this roadmap, opportunities for development grants and subsidies will be highlighted in order to achieve a key committee mandate objective to raise awareness in the sector for such funding.

5. *Enhance PD Opportunities*

Based on the feedback provided by the CEOs, the Human Capacity Working Group can collaborate with the various agencies and associations to pursue development opportunities in the areas identified above. Part of this collaboration could be the opportunity to develop a proposal for a skill exchange/secondment program or initiative to help address the issue of mobility and transferable skill development throughout the sector.

7. FUTURE AREAS OF INQUIRY

The role of benefits and workplace culture requires further investigation. While this study revealed some data to suggest a generational gap in how benefits are valued and preferences for workplace culture, more information would help identify further opportunities for learning and development in these areas. A future focus for the committee would be to focus more directly on generational differences in leadership and organizational culture and create a plan to advocate within the sector for policies and practices that support talent management through these areas.

Additionally, the areas of inclusion and diversity is an area for future investment. In additional to training in areas such as cultural competency, a strategy should be developed to engage the Library schools in supporting inclusion into the profession, as well as advocacy in the sector to foster inclusion as a leadership principle.

8. COMMUNICATIONS

Pending approval of this report by the FOPL Executive Director, a summary of this report will be prepared for the FOPL Board and distribution to the FOPL network. The Chair of the committee will identify opportunities to communicate to the broader sector through participation at professional conferences and publications.