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**Results from Federation of Ontario Public Libraries (FOPL)**

**Board Planning Workshop**

**Held at Toronto Reference Library on November 27, 2015**

**DRAFT**

**CONFIDENTIAL**

**FORT YORK FOUNDATION**

**RESULTS OF NOVEMBER 30, 2015 STRATEGY WORKSHOP**

**DRAFT & CONFIDENTIAL**

On November 27, 2015 the Board of the Federation of Ontario Public Libraries (FOPL) participated in a board planning workshop held at the Toronto Reference Library.

The objectives of the Workshop were to:

* To develop a **shared understanding of the current state of FOPL** and the strategic issues it must address in the future
* To develop **a clear vision of FOPL** 5 years from now – what should it have achieved and where should it be adding value?
* To develop **a roadmap for moving forward** – what needs to happen next and who should do what?

This report summarizes the results of the workshop.

**The Current State of FOPL**

Stephen Abrams provided a brief overview on the current state of FOPL and recent initiatives.

***Where Are We Today?* Strategic Assessment - SWOT Analysis**

The participants broke into groups to answer the questions:

* *What are the unique differentiating strengths of FOPL (relative to other sector organizations)?*
* *What weaknesses are limiting our potential impact?*
* *What external opportunities could we leverage?*
* *What potential threats should we be considering in our planning?*

Key points raised by the groups have been categorized and summarized below. Points in italics are direct quotes from group discussions.

**FOPL SWOT Analysis**

| **Strengths** | **Weaknesses** |
| --- | --- |
| **• Representation & Membership*** *Representative from all sizes of public libraries*
* *Represent diverse needs*
* *Strong levels of membership*

• **Partnerships:*** *Communicates well with other groups – CULC/SOLS/OLA/OLS-North*
* *Good to hear big 5 working together*

**• Strategic Focus*** *Focus on just Ontario public libraries - “One voice” narrower scope*
* *Single sector only “public libraries”*
* *Political advocacy*

**• Leadership*** *CEO*
* *CEO to do the work that needs to get done; Board members of the library world, active meetings, lobbying and being able to do so*
* *Combination of staff and trustees*
* *Board composition – staff and board representation*

**• Results*** *FOPL being recognized and respected*
* *Our emerging record, credibility, contribution*
* *Reasonably nimble*
* *Province-wide statistical data*
 | **• Representation & Membership*** *Low membership among small/rural/native libraries*
* *Membership driven – First Nations not able to afford membership; not really knowing FOPL’s purpose*
* *Challenge as a result of diversity and geography*
* *Not 100% of public libraries are members, therefore not really “one voice”*
* *Caucus structure – not using effectively*

**• Resources*** *No diversified funding*
* *Resources $$$, e.g. staff time*
* *Possibility of taking on too much*
* *No staff succession plan*

**• Need for Clear Priorities*** *Lack of clarity in choosing simple long term and short term priorities*
* *Crowded field, too many groups, too many acronyms*
* *Too much granularity so synthesis is a challenge – articulation of simple meaningful message*

• **Other:*** *Lack of member satisfaction data - How is FOPL doing? - No data from library members*
* *Website – information not available*
 |

| **Opportunities** | **Threats** |
| --- | --- |
| *•* **Demonstrate Value, Build Leadership Positioning*** *Increase membership by demonstrating value of FOPL*
* *Proofs, value, impact, heart*
* *Messaging clarity*
* *Build on respected position, accomplishments and deliverables*
* *FOPL as leader*

**• Promotion and Advocacy*** *Change the public’s perception of libraries*
* *Building relationships with municipal government (AMO, etc.)*
* *Continue with Library Day @ Queen’s Park (or every other year, pending available funds)*
* *Take lead promoting public libraries as community hubs/cultural commons*

**• Other*** *New CLA – reinvigorated federal presence to complement FOPL’s provincial one*
* *Gather data and information from member libraries re: needs, FOPL impact, etc.*
* *More training for members – increased value of FOPL and increased partnership opportunities*
 | **• Membership & Funding*** *Funding pressures on member libraries*
* *Membership may be too expensive*
* *Lack of member engagement*
* *Are libraries required to join too many associations, federations and organizations?*
* *Sustainable stable funding*
* *Are we too grant based?*

**• Staffing:** * *Threat of losing CEO who can lead the way; membership of larger libraries*
* *What if Stephen leaves? Dependent upon very small staff*

**• Lack of Understanding:*** *Public doesn’t understand what the library brand is*
* *Lack of understanding by municipal and elected officials*

**• Other*** *Division of effort – multiple/competing priorities*
* *Are we at the right tables?*
* *Who owns public libraries?*
	+ *Funding*
	+ *Municipal*
	+ *Federal*
	+ *Ontario*
	+ *Min. of Tourism, Culture and Recreation/inter-ministerial*
 |

**Identifying Strategic Issues for the Future**

At the end of this process, the group summarized **the key strategic issues facing FOPL over the next 5 years as follows** (note: these are not in priority order):

• Sustainability – resources - $ + staff

• Prioritization

• Positioning – clarity of promise, messaging, clarity of advocacy targets – who

• Getting deliverables to members and understanding impact

• Collaboration

• Membership including retention

• Diversity – French

***Where We Should Be Going*: Preliminary Brainstorming – Future Vision: 2020 +**

The groups then discussed the questions:

*• What should FOPL be known for in 2020?*

*• What value should FOPL be providing for key stakeholders?*

*• What would we want stakeholders to say about FOPL and its work?*

The following suggestions were made during the brainstorming session:

• Member advocacy – voice to government

• Go to for all public libraries

• Achievements – policy, campaigns

• Clear message – one voice

• Greater relationships beyond Ontario Government and TCR (school boards, employers, AMO)

• Leader of/in library sector – institutional (recognized by stakeholders)

• FOPL orchestrates the Ontario public libraries to deliver consistent messaging to the public

• FOPL is the trusted resource for public library information on the important topics

• FOPL generates library presence at the municipal level – educates the municipal sector and generates goodwill

• Successful advocacy to provincial government

• Well known as library leader supporting Ontario public libraries

• Marketing to Ontario citizens – citizens to understand value of public libraries

• FOPL builds capacity for local successes of public libraries

The groups also discussed what value FOPL should be providing for key stakeholders (see table below – direct quotes from group discussions)

|  |  |
| --- | --- |
|  | *What value should FOPL be providing for key stakeholders? What would we want stakeholders to say about FOPL and its work?* |
| *Public library users* | * *N/A*
* *(Only indirectly through marketing campaigns by members – FOPL is a silent partner)*
 |
| *Public library leaders (administrators and boards)* | * *Key focus as channel*
* *Enable libraries to do their jobs better by providing them tools and resources*
* *FOPL is a key leader on advancing public libraries*
* *Goal of FOPL is 100% membership*
* *Need much more communication with members to increase engagement and keep them informed. Members must see how FOPL supports them*
 |
| *Community leaders* | * *FOPL is a trusted resource for library/municipal information/education*
* *Impact messaging through AMO*
* *Through membership as members have direct contact*
 |
| *Community partners* | * *Through membership as members have direct contact*
* *Partnerships - e.g. school boards*
 |
| *Vendors* | * *Partner/Sponsor or N/A*
* *Minimally to support advocacy issues such as book publishers*
 |
| *Provincial government* | * *Target – Primary*
* *Must be more visible – we need an advocate or champion in the legislature – perhaps a back bencher*
* *Need to be known as the voice for all public libraries*
* *Need to keep all areas of government informed*
 |
| *Federal government* | * *Target*
* *Re: First Nations libraries and access to infrastructure funding*
 |
| *Other library sector associations* | * *Partner*
* *Work collaboratively to support FOPL objectives*
 |
| *Other sectors* | * *Minimally to support FOPL objectives*
* *Media for marketing/communication and media releases*
 |

**Synopsis of Strategic Directions:**

The group concluded that the following strategic directions should guide FOPL over the next 5 years:

• **Advocate to all of the Provincial Government, AMO and others** – “driving the car” on government policy

- Position libraries as playing a leading role in helping systems adapt to 21st century changes – collective impact

- Position libraries as community hubs – serving government policy

• **Equip local libraries to do consistent effective messaging to users and local municipalities**

 - Be an effective articulator of “the promise”

- Consensus-builder – the common ground

- Core common agenda

- Partnerships

- Mobilize the library community

- Provide research as an enabler

- Develop tools

- Make it easy to access – website

• **Identify new and emerging issues – maintain a “watching brief”**

• **Represent every library system in Ontario**

 - FOPL consulted and recognized as a conduit to public libraries

- Use caucuses

- “Adopt a library” to build membership

- Make it easy

- Show ROI

• **Partner with other provincial organizations and national organizations on national issues – e.g. First Nations**

• FOPL should not…

- Intervene in local issues

- Intervene in national issues

**Priority Strategic Objectives**

At the end of the workshop each individual was given 3 stickies and asked to answer the question:

*Given our current state and our potential long term vision, what 3 strategic objectives should guide our collective work over the next 5 years?*

The priority strategic objectives are summarized below. Numbers in parentheses refer to frequency of mention. Verbatim statements are provided in the attached appendix.

|  |
| --- |
| Priority Strategic Objectives (Draft) |
| * Be a strong voice/influence through government relations/advocacy (14)
* Equip local libraries with tools, information and training (9)
* Coordinate effective marketing and communications strategies (5)
* Build relationships with key partners/stakeholders (5)
* Develop plans for sustainability and succession (5)
* Grow and sustain the membership (3)
 |

**Next Steps**

The draft materials will be reviewed and then a draft report will be prepared for the membership. The committee structure should be reviewed to address the strategic priorities.

**Appendix – Verbatim Strategic Objectives**

**Be a strong voice and influence through government relations/advocacy (14)**

*• Focused plan of government relations agenda and priorities*

*• Advocating for public libraries in Ontario on key issues – to provincial government, AMO*

*• Advocating to provincial government for sustainable funding*

*• Political advocacy – recognized voice for public libraries*

*• Advocacy to provincial government for public library interests in issues*

*• Outcome*

*- X funding achieved*

*- X policies influenced*

*• Advocate to provincial government and AMO*

*• That FOPL has a strong voice and influence in government relations*

*- Influence on policy*

*- Provide government with current statistics*

*• Increasing our outreach with Queen’s Park*

*• Sharing our research insights with relevant ministries on a regular basis*

*• Advocate to AMO and other provincial “municipality-related” organizations to position public libraries as essential partners to meet 21st century challenges*

*• Advocacy at provincial level - raise awareness and profile of Ontario public libraries within the next 5 years*

*• Build relationships with AMO – on their agenda in 2016*

*• Be a voice for libraries to non-users*

*- Other ministries for funding*

*- Other stakeholders*

**Equip local libraries with tools, information and training (9)**

*• Proofs (stats) of public libraries value and impact*

*• Equipping local public libraries with resources/tools to do consistent and effective messaging*

*• Equipping local libraries to do consistent/effective messaging to users to local municipalities*

*• Equip public libraries with necessary tools to mobilize their communities and municipal leaders*

*• Offering training for library staff and boards*

*• Member libraries capacity increased*

*- X webinars attended*

*- X toolkits produced and used by member libraries*

*• Service to members*

*- Political advocacy*

*- Research*

*- Direction*

*• Communicate efficiently and regularly with member institutions*

*• Develop FOPL website – easy to navigate, find information to provide easy access to information, reports, etc.*

**Coordinate effective marketing and communications strategies (5)**

*• Formulation of a shared promise - building consensus and buy-in on the shared promise*

*• Marketing campaign*

*• Strategic communication*

*• Coordination of provincial marketing initiative*

*- Outcome – X exposures*

*• Provide libraries (public) in Ontario with marketing (comprehensive) strategy*

**Build relationships with key partners/stakeholders (5)**

*• Partnership/relationship building with library organizations*

*• Coordination of activities amongst different library associations*

*• Mapping the community of stakeholders who also buy into our shared promise*

*• Building solid relationships*

*- Provincial and cross-ministerial*

*- Municipal – by producing key messaging demonstrating value of libraries*

*- Other groups: OLA, FCLA, CULC, etc.*

*• To be the leading body in membership referral, i.e. FOPL is the first organization that libraries go to when facing an issue, asking questions, etc.*

**Develop plans for sustainability and succession (5)**

*• Address sustainability issues for FOPL*

*• Establishing a sustainable funding formula*

*• Succession planning – define our future and remove vulnerabilities*

*• Develop annual work plans with a balance of deliverables to members and advocacy – measure outcomes annually*

*• Set smart annual objectives, prioritizing our list*

**Grow and sustain the membership (3)**

*• Sustain current members, grow new to achieve 100%*

*• 100% membership by 2020*

*• Increase Board and member engagement*