



**Ottawa Public Library**

**OPL's Talent Plan:**

**Succession and Leadership Planning**

**Ottawa, Ontario, Canada**  
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**Prepared for the Ottawa Public Library**

**by**

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**April 2009**

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# Ottawa Public Library

## OPL's Talent Plan: Succession and Leadership Planning

Prepared by Vicki Whitmell

April 2009

### Executive Summary

This report outlines the elements that are essential to the development of a comprehensive talent and leadership plan for the Ottawa Public Library. By following its recommendations, OPL will be able to set into motion a key program that will help it to prepare for the loss of knowledge and skills of those retiring and will make certain that OPL staff are ready to take on changing and challenging roles.

The Ottawa Public Library is currently facing a number of workforce challenges, including an aging workforce, increased competition for staff, and the continuous need for the development of leadership, management and technical and professional skills. While strong in a number of areas, including its location and its ability to offer full- and part-time work in a wide variety of positions, OPL has concerns over the long-term retention of librarians and other staff (including those retiring), the increased competition for staff, the need for bilingual staff, and the preparedness of staff for assuming complex management and leadership roles.

OPL has already undertaken a number of initiatives in the development of its succession and leadership program. These include offering bursaries and funding for education, development and training programs, the hiring of a Staff Training and Development Officer to support these programs, and the offering of peer recognition and long-term service awards that recognize staff achievement. The Joint Professional Development Committee and the New Librarians Forum are two formally established groups within OPL that help to build an identity among staff and provide learning and orientation. The OPL Staff Investment Team (SIT) has completed its report entitled "Toward a Work Environment that Attracts, Retains and Motivates Committed Employees".

The recommendations in this report build upon those initiatives and serve to strengthen staff commitment to and knowledge of the Library and its staffing needs, emphasize the need for career planning and development and knowledge transfer at the individual staff level and strengthen the organization's ability to recruit and retain staff with needed competencies and skills.

**Recommendation 1: OPL should develop a comprehensive orientation program that will introduce permanent full- and part-time staff to the OPL during the first 12 to 18 months of employment.**

All new OPL staff members should be introduced to all parts of the library, its resources and services during the first 12 to 18 months of employment. This orientation should include training in knowledge specific to the position, but should also include a comprehensive overview of OPL's organization and governance, visits to the central library and various branches, as well as attendance at an OPL Board meeting. This program should be supported by a checklist that identifies the experiences, training and learning needed for all new staff over the first few years of their employment.

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**Recommendation 2: *That additional funding be sought to provide replacements for staff attending conferences and seminars and those attending training or taking on special projects, secondments and learning opportunities. Some of the \$165,225 in funding that the Ottawa Public Library received in 2009 from the Ministry of Culture's Library Credits should be used for this purpose.***

OPL's current budget for orientation, professional development and training courses is insufficient to replace or fill in for staff attending conferences and seminars, making it difficult for staff to attend such programs even when funding is available. Some of the \$165,225 in funding that the OPL received in 2009 from the Ministry of Culture's Library Credit program should be used to replace staff attending training or development programs or taking on secondments or special projects.

**Recommendation 3: *That OPL seek ways to reduce the amount of time spent by librarians providing front line service in order that they have more time to spend on learning, development projects and training.***

Reducing the amount of time spent by librarians on front-line service would allow them more flexibility to attend training and development programs or to take on secondments or special projects.

**Recommendation 4: *OPL should establish a formal mentoring program for its staff. The program would be voluntary and training would be provided to mentors and mentees. The OPL Joint Librarians Professional Development Committee should develop the program working with the New Librarians Forum.***

A mentoring program would provide additional support and advice to staff interested in taking on new positions or additional responsibilities.

**Recommendation 5: *All librarians should, during the first three years of their employment with OPL, be expected for a three-week period to, at minimum, either:***

- (a) work in another department (e.g. a reference librarian could work in the collections department)***
- (b) work in a similar job to their own in another branch, in particular a branch with different client groups or collection***
- (c) work in a different area in their home branch.***

***Ideally librarians would be interested in and encouraged and permitted to work in each of the three different situations.***

The goal with these short secondments is to give the staff member a sense of the organization as a whole and the various opportunities within it, and to broaden their skill sets and knowledge of users and collections.

**Recommendation 6: *OPL should encourage staff with the proper educational qualifications to complete their master's degree in library or information science on either a part or full-time basis. The policies and procedures now in place to financially support such endeavors should be continually and broadly publicized and made known to all staff.***

By encouraging staff to complete formal education programs at the professional or technical level, it will allow OPL to 'build from within'; developing those who have experience, interest in and loyalty to OPL.

**Recommendation 7: *OPL should ensure that its training and development programs are inclusive of those who are in the mid- to later career years.***

It is important for OPL to continue to involve, engage, refresh and rejuvenate those in mid-career. This can be done by providing them with fresh assignments, career changes, and skills

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and leadership training, and by giving them opportunities to mentor younger or less experienced colleagues.

**Recommendation 8:** *In the years leading up to their retirement OPL staff should be encouraged to take on special projects of interest and value to them and to transfer their knowledge and experience to others.*

This group should be encouraged to develop individual goals for their last years that would allow them to take on projects of special interest and value to them and would allow them to transfer their knowledge to others.

**Recommendation 9:** *OPL should develop an inventory of skills, aptitudes, and personal characteristics needed for both the short- and long-term in key library positions. In addition, the Library should identify any gaps of knowledge and behaviours in current staff and set in place plans to close those gaps.*

These competency profiles will be useful in recruitment, developing job descriptions, identifying gaps of knowledge and behaviours in current staff, and implementing individual and library-wide staff development plans. The competencies should reflect needs for today and the future.

**Recommendation 10:** *The OPL selection process must be reviewed to determine its effectiveness in hiring for abilities and leadership qualities. It is important that those who sit on hiring panels have proper training and are well-versed in OPL's staff and succession planning goals.*

OPL needs to ensure a balance in hiring for specific technical and professional skills along with abilities and characteristics such as flexibility, adaptability, leadership potential and learning agility. Hiring for behaviours as much as for technical skills will allow OPL to have people in place who are willing to take on new and broader responsibilities and to meet a variety of needs and roles in the future.

**Recommendation 11:** *All new vacancies or new positions should to be examined by the OPL senior management team as to their impact on the development of needed skills and aptitudes, the filling of gaps in skills and how changes to the position would help to work toward the goals of the library and its succession plan. No position should be hired for in isolation.*

It is important for OPL to take a 'big picture' approach to hiring – looking at vacancies and new positions as opportunities to rethink current staff complement and competencies across the board, rather than as isolated events.

OPL is undertaking a broad system-wide branch strategic review in 2009. This high-level review of positions should continue in order to ensure the appropriate mix of competencies, skills and abilities over the long term.

**Recommendation 12:** *OPL should develop a support program to help new immigrant employees at all levels to adjust to Canadian culture, work environment and day-to-day living.*

Ottawa attracts a large number of immigrants to the area and OPL should try to take advantage of this influx by hiring people new to Canada. OPL's formal policy that recognizes the credentials of non-North American library programs should be backed by a formal program that provides support and assistance to new Canadians working at OPL.

**Recommendation 13:** *That the OPL develop a proactive recruitment program and package that can be made available on its website and in its branches and taken to career fairs in the local area.*

This program would focus on developing a profile for OPL as an excellent place to work and build a career. The program should be developed for various target audiences and use a number of different venues.

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**Recommendation 14: *OPL should ensure that job postings for positions at OPL clearly outline the type and focus of the position, including needed subject focus and specialized experience and knowledge.***

Clearly outlined information on the expectations for positions (e.g. subject specialty) and the needed qualifications will encourage candidates to apply for suitable positions and will help them to prepare for interviews.

**Recommendation 15: *That OPL continue to work closely with the local library education programs at the University of Ottawa and the Algonquin College Library and Information Technician Program by providing co-ops, work placements and job opportunities, supporting staff in attending the programs and encouraging these programs to offer courses focusing on public library work and leadership.***

As part of its recruitment program, OPL should maintain a high profile in formal library education programs. OPL should also encourage the programs to introduce courses on public library librarianship and on leadership.

**Recommendation 16: *OPL should seek to reduce hierarchies within the OPL and provide more opportunities for formal and informal system-wide teamwork. This would be a way for OPL to give greater responsibility at the individual level, encourage leadership development and develop broader skill sets among staff members.***

OPL is organized very traditionally, with a number of management and responsibility levels. This type of layered structure can reduce the ability of staff to move easily between departments and may limit their ability to gain broader experience and to work on teams and projects. By developing a structure that provides more focus on teamwork, reduces management levels, and lowers the barriers between departments and groups, it will help OPL to create a broader skills base among its staff, improve their organizational knowledge and prepare more individuals for leadership positions.

**Recommendation 17: *OPL should encourage the development of leadership and management skills among staff who have indicated an interest in this area. Managers should work with interested staff to create a work and career plan to ensure that individuals are able to build the skills and capabilities that meet their and the organization's needs over time.***

The importance of identifying and developing individuals to take on future leadership role is a crucial and important role for OPL's management. All managers should be encouraged to take a role in providing developmental learning and experience to individuals in all parts of the organization in order to develop leadership and management skills.

**Recommendation 18: *OPL's senior management should regularly monitor the progress of individuals (behaviours and demonstrated leadership abilities and competencies) based on first-hand feedback, performance reviews and reports from others. The needs of both individuals and of the organization should be considered.***

OPL's senior management needs to have in-depth and comprehensive understanding of the potential leadership and management capacity of the organization. This can only be achieved through regular monitoring and review of the progress of individuals with potential for leadership positions.

**Recommendation 19: *OPL should encourage and facilitate staff to participate in formal leadership programs and should develop a formal leadership program either in-house or through an outside provider. The training should be supplemented with appropriate experience intended to build leadership and management skills.***

As part of its training and development program, OPL should seek to develop or subscribe to a formal leadership development program for staff.

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**Recommendation 20: *That the OPL New Librarians Forum be formalized, given a small budget and be able to take on special projects that can benefit the group or the organization as a whole.***

Formalizing the New Librarians Forum will provide an opportunity for members of the group to be involved in special projects, to work together more closely, to learn more about other parts of the organization and to take on leadership responsibilities.

**Recommendation 21: *Consideration should be given to having the New Librarians Forum work with the OPL Joint Professional Development Committee in the development of a mentoring program.***

Many members of the New Librarians Forum could benefit directly from involvement in a mentoring program. Thus, it is important for them to be useful in the design and development of the program so that it will meet their needs.

**Recommendation 22: *The membership of the Joint Professional Development Committee should be expanded to include the two coordinator positions that do not require professional librarian qualifications.***

This will ensure that all key positions in the Library are able to participate in the work of the Committee.

**Recommendation 23: *OPL should communicate the goals and components of its succession plan in a variety of ways, including an internal website, presentations at the branch and department level and regular reports on progress. Included in the communications plan should be supporting documentation, clearly outlined benefits of the plan to the organization and individual employees in both the short and long term. It is important for OPL to tell people how they can be involved and the benefits of their involvement.***

***Make the communications simple, easy to understand and repeat them often. Make succession planning discussions part of every performance appraisal, every management meeting and at Library Board meetings.***

Communication is critical to helping staff to understand the goals of the OPL succession plan and their role in it. Therefore the plan and all of its components must be communicated at all levels of the organization, including the Ottawa Public Library Board. Staff should be encouraged to be involved and thinking about how they can prepare themselves for the future and to discuss those plans with their managers.

**Recommendation 24: *OPL should determine the criteria needed to evaluate the success of its succession planning. Goals should develop for both the short term (1-3 years) and the long-term (up to ten years). Realistically it may take eight to ten years before the full benefits of the plan are achieved and known.***

Such measures may include attracting larger pools of qualified candidates for positions, having more staff ready for promotion and having available excellent internal and external candidates for positions. The successes should be linked to the Library's values and strategic goals and be clearly tied to OPL's need to build leadership.

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## **Conclusion**

The recommendations in this report focus on developing the leadership and management skills of current and future OPL management staff, developing the knowledge and abilities of key supervisors, team leaders and skilled professionals, and ensuring that the whole OPL staff complement is well-trained, multi-skilled, flexible, knowledgeable and adaptable.

Initiatives and tools that are already in place have laid the groundwork for OPL's talent and succession planning program. What is now required is that OPL's senior management and its Board put into place the programs, tools and funding that are needed to champion and carry all parts of the plan forward. This is essential in order for OPL to have in place the qualified, competent and skilled staff, managers and leadership that will ensure that OPL can meet the needs of the City of Ottawa's citizens and library users.

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# Ottawa Public Library

## OPL's Talent Plan: Succession and Leadership Planning

Prepared by Vicki Whitmell

April 2009

### Introduction

This report makes recommendations for the elements needed for a comprehensive succession and leadership plan for the Ottawa Public Library. The Library must be prepared for the future retirement of staff at all levels and it must continue to build the skills and abilities of its workforce to take on changing and challenging roles.

To this end, the recommendations in this report focus on three areas:

- Developing the leadership and management skills of current and future management staff
- Developing the knowledge and abilities of key supervisors, team leaders and skilled professionals
- Ensuring that the whole staff complement is well-trained, multi-skilled, flexible, knowledgeable and adaptable and that the library's organizational structure supports innovation, cross-training, knowledge transfer and communication among teams, groups and departments.

The report was prepared by Vicki Whitmell, Executive Director, Information and Technology Services Division and Legislative Librarian, Ontario Legislative Assembly, and a working group of the Ottawa Public Library consisting of Barbara Clubb, City Librarian, Barbara Herd, Division Manager, Public and Support Services, Sharon Campbell, Staff Training and Development Officer and Betty Hansis, Human Resources Consultant.

Vicki Whitmell was asked to assist in the development of an OPL development based on her interest and experience in succession planning and leadership development in libraries. Vicki is the editor of *Staff Planning in a Time of Demographic Change* (Scarecrow Press, 2005) and is the organizer of the Library Leaders Institute, an institute for executive-level library directors and managers.

### The Role and Importance of Succession and Leadership Planning

In the Spring of 2005 *The Future of Human Resources in Canadian Libraries*, (the '8Rs Study')<sup>1</sup> was released by the University of Alberta. The study considers issues related to the recruitment, retirement, retention, remuneration, repatriation, rejuvenation, re-accreditation and restructuring (the '8Rs') in Canadian public, academic and college, school and special library sectors.

The study found that in general "Canadian libraries are not implementing succession planning strategies, either because they do not perceive the need to do so, because they are overlooking

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the importance of preparing for retirements, or because they do not have the resources or know-how to do so.” The study adds: “Insofar as succession planning entails the recruitment, development and replacement of all staff and at all levels (in other words the entire matrix of the human resource cycle), it is clear that Canadian libraries need to make it more of a priority to proactively plan for their long-term human resource needs.”<sup>2</sup>

The 8Rs Study found that only 31% of members of the Canadian Urban Libraries Council (CULC) (the professional association of Canada’s large urban public libraries serving and supporting urban populations of more than 100,000) have a succession plan.<sup>3</sup> It reports that this lack of succession planning “is one of the contributors to experiencing difficulty replacing competencies that are lost when senior librarians retire.”<sup>4</sup> 8Rs concludes that it is crucial for public libraries to have a written plan with clear and measurable goals, guidelines and policies linked to the library’s strategic plan.

The Ottawa Public Library’s 2008-2011 strategic plan commits itself to human resource management, performance management and the development of OPL’s people. The recommendations in this report will result in the implementation of those strategies.

## The Context

The 8Rs Study is the most recent and most comprehensive report of its kind for Canadian libraries. Its findings can help to develop a clearer picture for OPL of its human resource needs. The study projects that CULC libraries will see a significant number of their staff retire in the next few years. It is estimated that 11% will retire by 2009 and 35% by 2014. Fifty-seven percent of staff in a position to retire by 2014 will be in supervisory or management positions.

### *Other important 8Rs findings include:*

While CULC library staff are generally satisfied with their current employment situation (including salaries, benefits and ability to make contributions), and 83% of CULC senior librarians have worked in their current library for more than 10 years,<sup>5</sup> CULC libraries are much more likely (88%) than most other library sectors to have a librarian leave.

- CULC libraries expect an increase in demand for librarians and paraprofessionals between 2003 and 2009.
- It is already evident that CULC libraries are having some difficulties in finding sufficient numbers of competencies in leadership and management. Expectations are high that CULC professionals will work in a management or supervisory roles but CULC librarians are less interested and feel less qualified than librarians in other sectors to take on management and supervisory responsibilities. While CULC libraries provide adequate training in some areas they are much less likely to provide training in leadership and management.
- Overall, the study indicates that in the short-term the professional librarian demand-supply equation does not suggest a crisis situation; however, all factors being equal, the longer-term picture suggests a librarian shortage.<sup>6</sup>

Although OPL’s expected retirements are somewhat lower than other member of CULC (9.65% v. 11%), the results of the 8Rs survey are important for the Ottawa Public Library in considering:

- The workplace and demographic characteristics of those who work in OPL and other public libraries
- The recruitment and training of staff
- Retirement trends and predictors
- Staff retention and mobility
- Projections for library and paraprofessional staff supply and demand

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- The need for training and leadership development of staff and future managers and supervisors.

Appendix A outlines the key data and findings of the 8Rs study relative to the Ottawa Public Library and other members of the Canadian Urban Libraries Council.

## **OPL's Situation**

The Ottawa Public Library is, like many other public and private organizations, operating in an environment where:

- There is an aging working population, many of who are expected to retire over the next few years;
- There is an increased challenge in finding those with the right mix of education, skills, knowledge, language, and characteristics to work for and remain with the organization;
- There is a continuous need for ongoing skills and leadership development; and
- Jobs, especially for those in management and supervisory positions, are increasingly more complex and faceted.

As a public library, OPL is challenged by the competition for library and information workers from other local libraries in the academic, government and special library sectors. OPL is further impacted by its requirements for bilingualism and the competitive size and strength of the federal government in recruiting and retaining information and library staff.

## **OPL's Strengths**

As an employer, the Ottawa Public Library has a number of strengths. Its location in a vibrant, livable, affordable city helps to attract candidates interested in working in Canada's capital. It offers both full-time and part-time positions, allowing people with family or school obligations to work alternative hours. It also offers people the opportunity to work in both of Canada's official languages or in a rural, suburban or urban setting. With its 33 branch locations, OPL is able to provide staff with the opportunity to work close to home. OPL is also buoyed by the recent launch of a graduate school in information studies at the University of Ottawa that is accepting its first student group in 2009.

## **Position Availability**

OPL has a wide variety of positions and duties to offer its employees. Generic job descriptions permit librarians to develop a broad set of skills, allowing them the potential to move between locations when positions become available. Competitions (union and non-union) are open to all library employees. Job descriptions are well written and clearly outline the skills and competencies required at each position level.

## **Staff Training and Development Initiatives**

OPL is taking the development and training of its staff seriously. It offers bursaries and funding to those interested in attending library-related university or college programs and has a budget for training and conference attendance. Staff are encouraged to be active in their professional associations. The Library also has access to the City's Learning Centre that offers training and development in a number of areas including management and supervisory certification and language training.

In October of 2007 the OPL Staff Investment Team (SIT) completed its report entitled "Toward a Work Environment that Attracts, Retains and Motivates Committed Employees." The goals of the project were to foster a positive work atmosphere through staff engagement and encouragement of leadership; to facilitate communication; and to address workplace challenges. The project

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team comprised a cross-section of staff and the result was the development of an initial framework for a long-term Staff Investment Strategy. Many of the recommendations of SIT, including the development of a job-shadowing program, support the development of a succession and leadership plan for the Library.

In 2007 OPL created the position of Staff Training and Development Officer to “provide, facilitate and support training and development for all employees within OPL.” The position was filled in 2008. As it develops, the position will be important in OPL’s succession and leadership planning.

### **Recognition and Rewards**

Staff members are recognized through peer recognition, long-term service and City of Ottawa awards, through “Bravo” cards (electronic cards that send a “well-done” message to employees with copies to their supervisors) and monthly reports to the Library Board that identify individual and group achievements. Each year the City provides funding to managers to support staff recognition programs and events. All Library units have taken advantage of this funding. In addition, the Library holds a general staff meeting to give out its recognition awards. Some managers keep feedback from users on the work of the individual in their employee file and OPL may share the successes and accomplishments of individuals and groups across the system in its staff newsletter and on the Library section of the City’s website.

### **Monitoring of Progress**

Annual performance appraisals for all staff are increasingly seen as an important in the identification of both short and long-term training and development needs and as a way to identify leadership and management potential. These performance appraisals outline goals and objectives for individuals for the coming year. Both provide an opportunity for each person to consider their role within the organization and how their work will contribute to its overall goals.

## **OPL’s Challenges**

Some of OPL’s strengths may also make it difficult to attract and retain staff. Just as a large and spread-out organization offers opportunities and diversity of work and experience, it may also create situations where staff have a feeling of isolation and disconnect from the organization as a whole.

While its large cohort of part-time staff (those working less than 25 hours per week) offers flexibility to some, working part-time may impact identification with and commitment to the organization. Also, while staff who work part-time have access to learning and development programs they may, for scheduling reasons, find it more difficult to take advantage of these opportunities.

### **Retention**

In 2007 seven librarians left their positions at OPL for various reasons. Six of these were re-hired as casual employees. As of the Fall of 2008 four more librarians had left. While losing a few librarians a year is not a cause for real concern, the fact that staff do leave, most after less than five years with the organization, but then return on a casual basis indicates that they remain interested in working in OPL but have needs that cannot be met by or at OPL. Anecdotal evidence exists that librarians leave for a number of reasons including better pay and different work conditions elsewhere.

This leads to a possible concern over the long-term retention of librarians for OPL. For those librarians initially attracted to public library work it is important for OPL to have in place a program that begins immediately after hire to identify and outline a career path for individual

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librarians and to have in place a development and training plan that supports that path. While it is recognized that OPL often cannot compete with, for example, the federal government's remuneration, Monday to Friday work schedule and/or large number of opportunities, the increased competition for librarians anticipated over the next few years means that much more attention will have to be paid to new staff and their development and training.

While generally successful in its hiring, OPL often attracts only a small number of bilingual candidates for its posted professional positions. Given the system's strengths as outlined above, it appears that the competition for librarians with the federal government and other libraries in the Ottawa area and the need for bilingualism are having an impact.

Retention issues will also become more evident with the anticipated loss of up to 66 OPL staff members (9.65% of its workforce) to retirements over the next few years. The projected retirements that were made by the City of Ottawa's Human Resources Department in October 2008 anticipate retirements at all levels of the organization. Of particular concern to OPL in its long-term succession planning is the anticipated retirement of some of the library's managers, supervisors and librarians.

This retirement crunch is compounded by not enough staff having either expressed an interest in taking on management positions and leadership roles or having the needed training to take on such positions. The 8Rs Study indicates that some staff may be interested in management but do not feel ready. Other possibilities for this lack of interest include a poor understanding of the work that managers do and the rewards of being in management, limited opportunities to take on short or long-term leadership or management duties or a preference by some to forgo a management role in order to work directly with library users. Given recent events in the City of Ottawa that have impacted some management positions, some staff may also be unwilling to leave the protection of the union ranks to take on a management or supervisory position.

#### **Identification of Those with Potential**

While the informal identification of those with management and leadership potential does occur at OPL, it is not done in a systematic way and there is no formal required training program for those on management or leadership tracks. While the job descriptions identify needed competencies for each position level, these competencies may not be adequately promoted to or discussed with individuals.

## **Recommendations**

The recommendations outlined below build on the work that OPL has already done in the development of its succession and leadership program and in the policies and procedures<sup>7</sup> that have been implemented.

#### **Establish a Formal Orientation Program**

It is important to ensure that all new OPL staff members are introduced to all parts of the library, its resources and services. This may mean an orientation to each department upon hiring or a requirement for staff to work in key departments at some point in their early development.

An excellent model of this type of orientation is the Library at the University of South Australia. It requires all professional staff to work for six months in the flexible delivery/distance learning department. The program serves to stimulate interest in other parts of the library and helps to create more cross-departmental teams and knowledge.

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Key to ensuring that all new staff have the needed solid grounding in skills, techniques, operations and procedures is being given a comprehensive orientation to the Ottawa Public Library during the first 12 to 18 months of employment. This orientation should include training in knowledge specific to the position, but should also include a comprehensive overview of OPL's organization and governance, visits to the central library and various branches, as well as attendance at an OPL Board meeting. Training should be done in a variety of ways including online/distance and face-to-face.

In addition, a checklist should be developed that lists the experiences, training and learning needed for all new staff. The checklist could include a list of suggested courses, workshops and seminars, secondments, readings and formal and self-development and experiences. The checklist would be completed by the staff member working with his/her manager over the first few years of their employment.

It is hoped that the orientation program will reduce the isolation some staff may feel who work in smaller branches, help to develop a better understanding of opportunities within the library system and encourage greater professional identification and long-term commitment to OPL.

**Recommendation 1: *OPL should develop a comprehensive orientation program that will introduce permanent full- and part-time staff to the OPL during the first 12 to 18 months of employment.***

#### **Funding**

While OPL has a budget for orientation, professional development and training courses, its budget is insufficient to replace or fill in for staff attending conferences and seminars. This makes it difficult for staff to attend non-mandatory training even when funding is available.

Further, it is often difficult for librarians to find the time needed to devote to development projects and learning because of their front line service requirements.

**Recommendation 2: *That additional funding be sought to provide replacements for staff attending conferences and seminars and those attending training or taking on special projects, secondments and learning opportunities. Some of the \$165,225 in funding that the Ottawa Public Library received in 2009 from the Ministry of Culture's Library Credits should be used for this purpose.***

**Recommendation 3: *That OPL seek ways to reduce the amount of time spent by librarians providing front line service in order that they have more time to spend on learning, development projects and training.***

#### **Mentoring Program**

OPL should also consider the establishment of a formal mentoring program that is far-reaching, consistent and has clearly articulated goals.

Mentoring programs are often difficult to sustain over the long-term, particularly without an individual or group to take responsibility for them. However, OPL can support its staff by helping them to develop mentor relationships themselves. Training can be provided for staff on how they can make the best use of their personal and work contacts, especially important when they are looking to take on a new responsibility or position.

In its role of supporting training and career development, the OPL Joint Librarians Professional Development Committee should be asked to develop this program. And, since the members of

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the New Librarians Forum are a key group to participate in it, OPL should also consider its involvement in the development of the mentoring program as well.

**Recommendation 4: *OPL should establish a formal mentoring program for its staff. The program would be voluntary and training would be provided to mentors and mentees. The OPL Joint Librarians Professional Development Committee should develop the program working with the New Librarians Forum.***

### **Professional Development, Training and Higher Education**

Many library staff members will commit long-term to OPL. Therefore, it is essential that plans be in place to continue to develop their skills, attitudes and approaches. While not all staff aspire to, or are capable of, holding supervisory or management positions, everyone should be encouraged to develop and excel at the work they do and to take a proactive stance in their own career development.

Working with their managers, each staff member should develop short-, medium- and long-term action plans for their development and tie them in with the competency profiles for the positions they are currently in or are preparing for.

Some research suggests that as much as 70% of development and learning takes place on the job. Therefore, much development work can be done fairly inexpensively within OPL. Short-term work assignments and/or secondments in other library departments and at other library branches, and involvement in team work can provide a great deal of development and professional learning. Staff should also be encouraged to step outside of their familiar environments and to take on, for example, positions on volunteer, association and community boards of directors.

**Recommendation 5: *All librarians should, during the first three years of their employment with OPL, be expected for a three-week period to, at minimum, either:***

- (a) work in another department (e.g. a reference librarian could work in the collections department)*
- (b) work in a similar job to their own in another branch, in particular a branch with different client groups or collection*
- (c) work in a different area in their home branch.*

***Ideally librarians would be interested in and encouraged and permitted to work in each of the three different situations.***

***The goal with these short secondments is to give the staff member a sense of the organization as a whole and the various opportunities within it and to broaden their skill sets and knowledge of users and collections.***

In order to develop professionals from within the organization, para-professionals and support staff should be encouraged to work toward their master's library science designation. This building from within has already been beneficial to OPL and other organizations such as the Hamilton Public Library, allowing them to develop a staff of educated librarians and support staff who have loyalty and experience to bring to the library.

**Recommendation 6: *OPL should encourage staff with the proper educational qualifications to complete their master's degree in library or information science on either a part or full-time basis. The policies and procedures now in place to financially***

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***support such endeavours should be continually and broadly publicized and made known to all staff.***

### **Engage Everyone**

OPL should also look for similar opportunities to continue to train and engage mid-career professionals and staff. A 2006 article in the *Harvard Business Review*<sup>8</sup> suggests that this group is often neglected and frequently passed over for promotion and opportunities in favour of younger staff. The authors remind us that many members of this group have 15 to 20 years left in the workplace and have a great deal to contribute.

Auster and Chan support this observation in writing about these members of the library community:

*"Older workers [anyone over the age of 45] are a resource we cannot waste ... Numerous studies suggest that workers over age forty-five have a difficult time finding employment in the labor market. Older workers have difficulty finding jobs, are less likely to receive training from their employer, and face other discriminatory practices."<sup>9</sup>*

Rejuvenating and re-engaging this large mid-career group can be done by providing fresh assignments, career changes and challenges, opportunities to mentor younger or less experienced colleagues and leadership training.

***Recommendation 7: OPL should ensure that its training and development programs are inclusive of those who are in the mid- to later career years.***

Care should be taken in particular for managers to work with those who have indicated their interest in retirement within three to five years. This group should be encouraged to develop individual goals for their last years that would transfer their knowledge to others. This is a good opportunity and time for them to take on and complete projects of special interest and value to them.

***Recommendation 8: In the years leading up to their retirement OPL staff should be encouraged to take on special projects of interest and value to them and to transfer their knowledge and experience to others.***

### **Identify Competencies**

OPL should develop an inventory of skills, aptitudes, and personal characteristics needed for both the short- and long-term in key library positions. Such competency profiles will be useful in recruitment, developing job descriptions, identifying gaps of knowledge and behaviours in current staff and implementing individual and library-wide staff development plans.

The competencies identified should be those that are needed to advance OPL's strategic directions, serve its users and advance needed innovation and change. It is important the competencies reflect the needs for today and the future. It should be recognized that planning for the future human resource needs of OPL libraries is complicated by the changing role and increased complexity of libraries and the information needs of library users.

A number of competency profiles are available for public libraries and these should be reviewed for their relevance to OPL's circumstances. The profiles should clearly define the role of information professionals, outline core and professional competencies, detail expectations in the management of a public library and the management of technology, collections, information resources and user services. The profile should also outline the personal competencies required of those working in the library. These would include demonstrated competencies in the

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leadership of teams and groups. OPL's work in this area can begin by developing more fully the needed competencies now identified in its job descriptions.

At the October 2008 Library Summit on Human Resources held in Ottawa the attendees and their associations agreed to consider the development of competency profiles for librarians. If this work is underway quickly it could serve as a resource in the development of OPL's competency profiles.

***Recommendation 9: OPL should develop an inventory of skills, aptitudes, and personal characteristics needed for both the short- and long-term in key library positions. In addition, the Library should identify any gaps of knowledge and behaviours in current staff and set in place plans to close those gaps.***

#### **Recruitment and Hiring Practices**

OPL should consider changes in its recruitment and hiring processes to ensure a balance in hiring for specific technical and professional skills along with abilities and characteristics such as flexibility, adaptability, leadership potential and learning agility. Hiring for behaviours as much as for technical skills will allow OPL to have people in place who are willing to take on new and broader responsibilities and to meet a variety of needs and roles in the future. The hiring process should be revised to reflect this new emphasis.

***Recommendation 10: The OPL selection process must be reviewed to determine its effectiveness in hiring for abilities and leadership qualities. It is important that those who sit on hiring panels have proper training and are well-versed in OPL's staff and succession planning goals.***

It is also important for OPL to take a 'big picture' approach to hiring—looking at vacancies and new positions as opportunities to rethink current staff complement and competencies across the board, rather than as isolated events. An example of this type of approach is at Curtin University Library in Perth, Australia. The Library hires for all vacant and new positions at the same time each year, allowing it to take an organization-wide perspective on positions and the people needed to fill them. This process also allows Curtin to build on needed skills and aptitudes across the board and permits staff to move more easily between jobs within the library.

OPL currently reviews the need for the filling of vacancies through its harmonization teams and is undertaking a broad system-wide branch strategic review in 2009. The high-level review of positions should continue following the completing of this work in order to ensure the appropriate mix of competencies, skills and abilities over the long term.

***Recommendation 11: All new vacancies or new positions should to be examined by the OPL senior management team as to their impact on the development of needed skills and aptitudes, the filling of gaps in skills and how changes to the position would help to work toward the goals of the library and its succession plan. No position should be hired for in isolation.***

#### **Attracting New Canadians**

The data in the 8Rs Study suggests that Canadian libraries hire few immigrants and that "fewer than three in ten libraries have a formal policy recognizing the credentials of librarians who have graduated from non-North American programs and even fewer (2%) of current librarians obtained their degrees outside of North America."<sup>10</sup>

Ottawa attracts a large number of immigrants to the area. OPL should try to take advantage of this influx of people by hiring people new to Canada to work in the Library. This is already

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beginning - the Library recently had its first success in hiring a librarian with credentials and education from outside North America.

OPL has recently put into place a formal policy that recognizes the credentials of non-North American library programs. This policy should be backed by a formal program that provides support and assistance to new staff from outside Canada that would help them adjust to Canadian culture, work environment and day-to-day living. OPL's new policy, offered in conjunction with the support program, should assist OPL to attract more applicants. It will also allow OPL to take a leadership role in this area in the Canadian library community.

**Recommendation 12: *OPL should develop a support program to help new immigrant employees at all levels to adjust to Canadian culture, work environment and day-to-day living.***

### **Recruitment Tactics**

In order to increase the number of qualified applicants for its positions, OPL should continue to develop a proactive program for recruitment for all of its key positions. This program would focus on developing a profile for OPL as an excellent place to work and build a career, highlight its strengths in flexible hours, work near home, the development of an interesting and rewarding career that includes community involvement, and its training and development and mentoring programs.

The recruitment program should be developed with its various target audiences in mind, which could include:

- Teens looking for part-time or casual work
- University students with an interest in learning about librarianship
- Professionals looking for a second career
- New Canadians.

The Library has a number of different venues to promote recruitment, including:

- OPL and City of Ottawa websites
- external websites and social networking sites such as My Space, YouTube and Facebook
- placing posters at its branches
- attending career fairs at local high schools, colleges and universities
- providing information sessions to borrower services staff, including Pages, who are already employed by the Library.

In developing its program the Library could make use of materials being used by other public libraries and the InfoNation site developed by the Canadian Library Association: [www.cla.ca/infonation](http://www.cla.ca/infonation)

Program materials could include information on types of positions and their likely availability, any experience and/or educational background needed, testimonials from OPL staff and students, an overview of pay scales and benefits, details on the work culture and information on Canadian library education (college and university) programs.

**Recommendation 13: *That the OPL develop a proactive recruitment program and package that can be made available on its website and in its branches and taken to career fairs in the local area.***

Currently, individual OPL managers make decisions regarding the information that is contained in job postings. Lack of clear information on expectations for the position and needed experience

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and qualifications may discourage candidates from applying or may leave applicants unprepared for interviews.

**Recommendation 14: *OPL should ensure that job postings for positions at OPL clearly outline the type and focus of the position, including needed subject focus and specialized experience and knowledge.***

### **Involvement with Local Library Education Programs**

The University of Ottawa is opening a master's program in library science in January 2009. OPL has been involved in the development of this program and should benefit from the program's bilingual students who will graduate with a comprehensive understanding of libraries and their users. OPL should work to maintain a high profile in this program and with the Algonquin College Library and Information Technician program in order to encourage their graduating students to apply for positions at OPL.

The Library's profile to students could be enhanced through work placements, the hiring of schools' graduates, having OPL staff take on adjunct or guest teaching positions, sponsoring student groups and causes, attending resume workshops and career fairs and supporting individual OPL staff to take courses and degrees at the schools. (OPL staff already sit on advisory committees for this program and the Algonquin College Library Techniques program). This should help to increase the awareness of what and how the students are being taught, bring a real life perspective to the students' education and, perhaps, allow the Library to exert some influence in the curriculum and choice of students. Benefits also include being able to identify upcoming students as potential staff members.

Both the University of Ottawa and Algonquin programs should be encouraged to add to their curriculum courses on public libraries. These courses should be taught by instructors with significant experience at a variety of levels in the public library sector and should include a practicum project at OPL, guest lectures by OPL librarians and coursework on the uniqueness of public libraries and the issues they face.

Both programs should also be encouraged to add leadership development courses to their curriculum. The courses should focus on leadership styles, consider case studies, introduce students to leaders in the Ottawa library community and assist them in being involved in association leadership at the local and national level. This should help to develop their interest in taking on important leadership roles as their careers progress.

**Recommendation 15: *That OPL continue to work closely with the local library education programs at the University of Ottawa and the Algonquin College Library and Information Technician Program by providing co-ops, work placements and job opportunities, supporting staff in attending the programs and encouraging the programs to offer courses focusing on public library work and leadership.***

### **Review OPL's Organization and Culture**

Many libraries, including OPL, are organized very traditionally, with a number of management and responsibility levels. This type of layered structure can reduce the ability of staff to move easily between departments and may limit their ability to work on teams and projects and, hence, to develop a broader understanding of the various departments and groups within the organization. More collaborative structures that focus on team work, reduce management levels, and lower the barriers between departments and groups are becoming the norm in many organizations and aid in creating a broader skills base, improving organizational knowledge and preparing individuals for leadership positions.

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**Recommendation 16: *OPL should seek to reduce hierarchies within the OPL and provide more opportunities for formal and informal system-wide team work. This would be a way for OPL to give greater responsibility at the individual level, encourage leadership development and develop broader skill sets among staff members.***

#### **Formal Development of OPL Leaders and Managers**

The 8Rs Study asks whether leadership can be taught, recognizing that it "is to some extent dependent upon the personal characteristics and motivation level of the individual."<sup>11</sup> This is true. It is also true that leaders must be cultivated.

The importance of identifying and developing individuals to take on future leadership roles is a crucial and important role for OPL's senior management. While some leaders will be sought from outside the Library, individuals must also be developed for leadership positions from within.

Some succession plans have a formal process for identifying managers and leaders either through self-identification or management choice. While this can work in many organizations, for others it may lead to a feeling that some have been chosen over others. For this reason OPL may not wish to take this approach.

Instead, it is suggested that the OPL senior management group regularly review the performance appraisals of all librarians, supervisors and managers and, based on the overall needs of OPL for skills and leadership development, encourage individuals to undertake development and training that will contribute to OPL's needed mix of leadership qualities, technical skills and management training.

Individual goals and training and development would be determined by the individual employee and their manager but would be reviewed by the senior management group.

All staff would be encouraged to develop a career path for themselves and to report on their progress during their performance review.

**Recommendation 17: *OPL should encourage the development of leadership and management skills among staff who have indicated an interest in this area. Managers should work with interested staff to create a work and career plan to ensure that individuals are able to build the skills and capabilities that meet their and the organization's needs over time.***

**Recommendation 18: *OPL's senior management should regularly monitor the progress of individuals (behaviours and demonstrated leadership abilities and competencies) based on first-hand feedback, performance reviews and reports from others. The needs of both individuals and of the organization should be considered.***

#### **Leadership Training Program**

As part of its training and professional development program OPL should seek to develop on its own or subscribe to through an outside provider, a leadership development program for staff members who have expressed an interest in leadership and who have developed, in discussion with their managers, a career path that has goals related to supervisory or management responsibilities.

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The formal program would be enhanced by finding ways for individuals to take responsibility for staff and budget, including working with special project teams, and providing opportunities for exchanges and secondments.

**Recommendation 19:** *OPL should encourage and facilitate staff to participate in formal leadership programs and should develop a formal leadership program either in-house or through an outside provider. The training should be supplemented with appropriate experience intended to build leadership and management skills.*

### **New Librarians Forum**

OPL already has in place a semi-formal group of 'new' librarians, those who have graduated within the past five years. This group meets annually with the Library's senior management to consider special topics.

Formalizing the group, giving it a small budget and allowing it to meet more often would provide an opportunity for members of the group to be involved in special projects, to work together more closely, to learn more about other parts of the organization and to take on some leadership responsibilities within the group. Formalizing the forum would also serve to create an identity for the group which should help in getting their long-term commitment to OPL.

**Recommendation 20:** *That the OPL New Librarians Forum be formalized, given a small budget and be able to take on special projects that can benefit the group or the organization as a whole.*

**Recommendation 21:** *Consideration should be given to having the New Librarians Forum work with the OPL Joint Professional Development Committee in the development of a mentoring program.*

### **Joint Professional Development Committee**

In order to ensure that all key positions in the Library are able to participate in the work and activities of the Joint Professional Development Committee, the two Library coordinator positions should be included in the group.

**Recommendation 22:** *The membership of the Joint Professional Development Committee should be expanded to include the two coordinator positions that do not require professional librarian qualifications.*

### **Communication**

Key to the success of the OPL's succession plan will be communicating its succession plan and all of its components to all levels of the organization, including the Ottawa Public Library Board. Communication is important to help staff understand the goals of the plan and their role in it, and how it will be implemented and evaluated. Communication should come from the City Librarian and senior library managers as well as from supervisors and managers.

Critical to the success of the plan will be buy-in at all levels, particularly those in supervisory and management positions. For this reason library staff should be encouraged to get involved and thinking about how they can prepare themselves for the future.

**Recommendation 23:** *OPL should communicate the goals and components of its succession plan in a variety of ways, including an internal website, presentations at the branch and department level and regular reports on progress. Included in the*

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***communications plan should be supporting documentation, clearly outlined benefits of the plan to the organization and individual employees in both the short and long term. It is important for OPL to tell people how they can be involved and the benefits of their involvement.***

***Make the communications simple, easy to understand and repeat them often. Make succession planning discussions part of every performance appraisal, every management meeting and at Library Board meetings.***

### **Measure Success**

It is important for OPL to determine how it will know when its succession plan is a success. This may include a number of measures, including attracting larger pools of qualified candidates for positions, having more staff ready for promotion and having available excellent internal and external candidates for junior and senior positions.

The successes should be linked to the Library's values and strategic goals and be clearly tied to OPL's need to build leadership.

***Recommendation 24: OPL should determine the criteria needed to evaluate the success of its succession planning. Goals should developed for both the short term (1-3 years) and the long-term (up to ten years). Realistically it may take eight to ten years before the full benefits of the plan are achieved and known.'***

### **Conclusion**

The recommendations in this report focus on developing the leadership and management skills of current and future OPL management staff, developing the knowledge and abilities of key supervisors, team leaders and skilled professionals, and ensuring that the whole OPL staff complement is well-trained, multi-skilled, flexible, knowledgeable and adaptable.

Initiatives and tools that are already in place have laid the groundwork for OPL's talent and succession planning program. What is now required is that OPL's senior management and its Board put into place the programs, tools and funding that are needed to champion the qualified, competent and skilled staff, managers and leadership that will ensure that OPL can meet the needs of the City of Ottawa's citizens and library users.

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## Footnotes

1. 8Rs Team. The Future of Human Resources in Canadian Libraries. Edmonton: University of Alberta, 2005 ([www.ls.ualberta.ca/8rs/8RsFutureofHRLibraries.pdf](http://www.ls.ualberta.ca/8rs/8RsFutureofHRLibraries.pdf). Accessed November 13, 2008)
2. Ibid.: 95
3. Ibid. Figure E.2 Organizations with Succession Plan by Library Sector: 95
4. Ibid.: 95.
5. Ibid. Figure F.1 Percentage of Senior Librarians Working at Current Library for More than 10 Years: 101
6. Ibid.: 171.
7. These include:
  - Employee Recognition Policy (ADM-08-083-POL) (September 4, 2008)
  - Employee Participation in System-Wide Training and Development Initiatives (ADM-08-081-POL/PRO) (June 12, 2008)
  - Staff Investment Team Final Report (October 10, 2007)
  - Job Descriptions that outline the competencies required for the position
  - A performance management system
  - Continuous Learning Policy (ADM-08-048-POL) (June 10, 2008)
  - Continuous Learning Procedure (ADM-048A-PRO) (June 10, 2008)
  - Continuous Learning Procedure (ADM-048b-PRO) (June 10, 2008)
  - Financial Aid: Library or Information Studies Degree or Library Technician Diploma (ADM-07-078-POL) (September 10, 2007)
  - Financial Aid: Library or Information Studies Degree or Library Technician Diploma (ADM-07-078-PRO) (September 10, 2007)
  - Assessing Foreign Credentials ADM-08-086 (September 18, 2006)
8. Morison, Robert, Tamara Erickson, and Ken Dychtwad, "Managing Middlecence," *Harvard Business Review* (March 2006): 78-86.
9. Ethel Auster and Donna Chan, "Meeting the Training and Development Needs of an Aging Workforce," in V. Whitmell, ed. *Succession Planning in a Time of Demographic Change*. (Lanham, Maryland: Scarecrow Press, 2005): 58.
10. 8Rs Study: 46
12. Ibid.: 135.

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## Appendix A.

### The Future of Human Resources in Canadian Libraries, 'the 8Rs Study'

#### Data and Finding for CULC Libraries

#### **The 8Rs Study**

Published in the Spring of 2005, the 8Rs Study is wide-ranging and important. It considers issues related to the recruitment, retirement, retention, remuneration, repatriation, rejuvenation, re-accreditation and restructuring (the '8Rs') in Canadian academic and college, public, school and special library sectors. The study was initiated by the University of Alberta in partnership with a number of Canada's library associations (including CULC), in response to reports that there was an impending crisis in staffing in Canadian libraries as many members of the Canadian library workforce edge their way to retirement.

In considering the impact of retirements, the researchers recognized that:

"retirements could not be viewed in isolation from a number of other factors...[and] the research [was] expanded to encompass such related matters as recruitment, retention, education, training, and quality of work, all within a context of the changing roles of libraries and library staff... ."<sup>2</sup>

The study surveyed 461 library administrators and human resource managers; over 2,200 librarians and 2,000 paraprofessionals,<sup>3</sup> held in-depth telephone interviews with 17 library administrators and conducted three focus group sessions. The study also included a literature review and analyses of the existing data.<sup>4</sup>

The results consider the workplace and demographic characteristics of those working in Canadian libraries, the needs and barriers to the recruitment of library staff, retirement trends and predictors, staff retention and mobility, evaluations of library school and technician programs, organizational training and intrinsic and extrinsic benefits and job satisfaction. The study also considered projections for library and paraprofessional supply and demand and relations between job requirements and needs and the supply of staff to meet those needs.

Almost 90% of the institutional members of CULC responded to the study's survey<sup>5</sup> (25% of the total sample<sup>6</sup>). This response was large enough for the researchers to consider CULC as a unique sector within the larger Canadian library workforce.

#### **The CULC Workforce**

CULC libraries employ 41% of Canadian librarians.<sup>7</sup>

#### **Age**

The study suggests that the Canadian library workforce is aging and CULC libraries demonstrate this trend. Thirty-four percent of CULC librarians are under the age of 45, 47% are between 45 and 54, and 19% are over the age of 55. Paraprofessional staff are somewhat younger, with 42% of CULC paraprofessionals under the age of 45, 38% between ages 45 and 54, and 20% over the age of 55.<sup>8</sup>

Most telling is that 58% of CULC librarians are over the age of 45. Fifty-seven percent of paraprofessionals are in this same age group.<sup>9</sup>

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## **Experience**

As might be expected given their age, CULC librarians are an experienced group, with 57% of them being in the workforce more than 15 years and 27% between 6 and 15 years. Only 16% have worked as a professional librarian for less than 6 years.<sup>10</sup>

A larger percentage of CULC paraprofessional staff are recent entrants (29%) 43% have been working for more than 15 years, while 28% are in mid-career. <sup>11</sup>

## **Diversity**

Visible minorities represent only 8% of librarians in CULC libraries, with only a very small percentage (2%) of this group being found in senior administrative positions. Aboriginals are an even smaller group, representing only 1% of CULC librarians.<sup>12</sup>

## **Availability of Management Positions**

A large percentage (61%) of CULC librarians work in a management role. Eight percent of these are senior administrative positions and 53% are supervisor or middle management positions.<sup>13</sup>

The possibility for CULC paraprofessionals to work in an administrative position is even lower, with only 19% of CULC paraprofessionals working in supervisory or middle management positions.<sup>14</sup>

## **Job Satisfaction**

The study concludes overall that the Canadian library workforce is content and, for the most part, satisfied with their current employment situation.<sup>15</sup> This is true for CULC libraries, with 76% of librarians<sup>16</sup> and 78% of CULC paraprofessionals<sup>17</sup> indicating that they were satisfied with their jobs. Generally, satisfaction rates increase the more advanced the position, with 82% of supervisors and middle management expressing satisfaction. However only 76% of CULC senior administrators express satisfaction. <sup>18</sup>

Interest in remaining with their current organization also increases for CULC librarians as they move through their career: 45% of CULC recent librarian entrants, 49% of mid-career librarians and 68% of senior librarians indicated that they would be interested in staying the remainder of their career in their current library.<sup>19</sup> Satisfaction rates are paraprofessionals are higher they move through their careers with 79% of those at the end of their career expressing satisfaction.<sup>20</sup>

## **Staff Retention**

CULC libraries are much more likely than most other library sectors to have a librarian leave, with 88% of CULC libraries experiencing at least one departure in 2002. (Seventy-seven percent of this group left voluntarily.) This compares to an overall average of 25% of Canadian libraries that had a librarian leave in the same year.<sup>21</sup>

## **Retirements**

As noted, the 8Rs Study was initiated in response to reports that there was an imminent crisis in Canadian libraries as members of the library workforce reached retirement age and left the profession. The concern was that there would not be enough librarians and paraprofessionals to replace those leaving and that the library and library technician education programs did not have adequate enrollments to meet the future needs of the library community.

The 8Rs Study reveals similar data, indicating a trend for library staff to work longer than in the past. This trend has been affected by a number of factors, including the availability of adequate organizational and individual pension plans, changes to mandatory retirement laws, and organizational programs that offer part- or flexible-work time for those at or nearing retirement.

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Based on this trend, the study estimates that if the retirement age continues to rise or stay at the same level as it is today, 25% or 2,250 librarians will retire by 2009 and 48% or 4,320 by 2014.<sup>22</sup>

However, if the trend toward working longer continues, these estimates will be smaller.<sup>23</sup> The study concludes, "if the age of retirement increases over the next decade by only a few years, the compounded proportion of professional librarians retiring will no longer reach critical levels."<sup>24</sup> Under this scenario, it is estimated that the retirement situation will be similar to the period from 1997 to 2002, a period in which CULC libraries had little difficulty in replacing retired or leaving staff.

In considering these latest trends, Denise M. Davis, Director of the Office for Research & Statistics for the American Library Association states, "the issue isn't having LIS graduates in the marketplace, the issue becomes having qualified librarians to promote into the positions vacated due to retirement."<sup>25</sup>

CULC libraries have already been affected by the retirement of staff. Eighty-eight percent of CULC libraries had at least one FTE librarian retire between 1997 and 2002<sup>26</sup> and 68% of CULC libraries experienced a retirement of paraprofessional staff.<sup>27</sup> During that period CULC members had an average of 4.1 retirements per library, with a loss of 7% of the librarians and 9% of the paraprofessional workforce.<sup>28</sup> This is much lower, for example, than projected retirements in CARL libraries.

Estimates are provided in the study for when CULC librarians over the age of 50 expect to retire. Thirty-eight percent expect to retire between 55 and 60, 28% between 61 and 64, 25% at age 65 and % after age 65.<sup>29</sup>

The study estimates that 1% of CULC librarians will retire by 2009 (9% in non-management and 13% in management positions). Thirty-five percent of CULC librarians are expected to retire by 2014 (31% in non-management and 57% in management positions).<sup>30</sup> Lower rates are estimated for CULC paraprofessionals, with 15% of that group expected to retire by 2009 and 31% by 2014.<sup>31</sup>

### **Ability to Replace Retirees**

Overall, the study found that libraries are finding it harder to replace leadership skills than technical skills and knowledge.<sup>32</sup> CULC libraries are facing this dilemma with 35% of CULC libraries reporting that they had experienced difficulty in replacing skills and knowledge. An even higher number (46%\_ reported that they had experienced difficulty in replacing leadership qualities.<sup>33</sup>

The major barriers CULC libraries face when replacing retiring librarians are:

- the inability to fast-track candidates (77%)
- an inadequate pool of qualified candidates (73%)
- an inadequate pool of interested candidates (73%)
- inadequate leadership training by MLIS programs (58%)
- lack of a succession plan (58%)
- budget restraints (46%)
- elimination of middle-level positions (42%).<sup>34</sup>

The most serious issue for CULC is the future retirement of its senior librarians and administrators. The study indicates that a "somewhat greater number of management than non-management librarians are predicted to retire in the next 5 to 10 years."<sup>35</sup>

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## Recruitment Needs

### Anticipated Growth

CULC libraries were among the most likely Canadian library sectors to have hired in 2002. Anticipated growth is strong with 81% of CULC libraries indicating an increased need to hire librarians.<sup>36</sup>

CULC libraries reported an overall growth in their workforce of 2.8% in 2002.<sup>36</sup> More than three-quarters (77%) of CULC libraries also anticipate increased demand for librarians to 'some' or a 'great' extent for the five years 2003-2008.<sup>37</sup>

Eighty-nine percent of CULC libraries also reported an increased demand for paraprofessionals.<sup>38</sup> Overall, the study indicates that there will be a future increase in demand for paraprofessionals, with a possible shortage of library technicians by 2014.<sup>39</sup>

### Needed Skills and Competencies

Twenty-eight percent of CULC libraries experience some problems recruiting.<sup>40</sup> Barriers to recruitment included: budget restraints (73%), inadequate pay (69%), inadequate pool of qualified candidates (69%), competition from Canadian libraries (62%), an inadequate pool of interested candidates (58%), inadequate MLIS education (44%), geographic location (46%), hiring freeze (32%), and the need to hire bilingual staff (23%).<sup>41</sup>

When CULC libraries were asked to rank the most important and most difficult to find competencies among staff they identified the importance of leadership and managerial competencies. CULC libraries ranked as their top ten competencies:

1. Leadership potential
2. Managerial skills
3. Can flexibly respond to change
4. Innovativeness
5. Entrepreneurial skills
6. Can handle high volume workload
7. Years of experience
8. Commitment to organizational goals
9. Technical skills
10. MLIS degree.<sup>42</sup>

While the study concludes that: "CULC libraries are advised to consider marketing more rigorously to MLIS students (and perhaps to library school professors) about the benefits of working in public libraries. The extent to which MLIS programs focus on librarianship within the public sector should also be examined."<sup>43</sup>

### Interest and Readiness

Many public librarians indicated an interest in moving into more responsible positions with 60% of recent librarian entrants working in public libraries indicated an interest in moving into more responsible positions. The numbers lowered as staff moved forward in their careers, with 58% of mid-career librarians and 21% of senior librarians showing an interest.<sup>44</sup>

When CULC librarians were asked to indicate their qualification for higher positions only 52% of CULC recent entrants indicated that they were ready. As might be expected higher percentages of mid-career librarians (77%) and senior librarians (79%) felt prepared.<sup>45</sup> The study suggests that the reason for this is not necessarily the lack of advancement opportunities (50% of CULC libraries indicated that they are able to offer good or excellent promotional opportunities<sup>46</sup>), but with the low level of library turnover<sup>47</sup> that makes it difficult for CULC librarians to get the training and experience they need to prepare them for promotion.

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## Training

CULC libraries received the lowest marks among all library sectors in providing sufficient opportunities for training among recent entry librarians.<sup>48</sup> While eighty-nine percent of CULC librarians reported receiving job skills training, mainly in technology skills (88%) and customer-service (83%)<sup>49</sup>, the study found that: "When professional librarians were asked to provide the type of training they felt they would need to move into a higher-level position, by far the most predominant response was training in management, leadership and business skills (70%)."<sup>50</sup> Yet only 49% of CULC staff had received management training. A mere 27% had received leadership training.<sup>51</sup> Much smaller numbers reported receiving mentorship training, job rotations and job sharing.

## Summary of Findings

The findings of the 8Rs Study develop a clearer picture for CULC members of the human resource needs for their libraries in both the short- and the long-term. To summarize the key points:

- CULC libraries have an aging workforce with 66% of library staff over the age of 45.
- Expectations are high that CULC professionals will work in a management or supervisory role. While CULC library staff are generally satisfied with their current employment situation (including salaries, benefits and ability to make contributions), and 83% of CULC senior librarians have worked in their current library for more than 10 years,<sup>52</sup> CULC libraries are much more likely (88%) than most other library sectors to have a librarian leave.
- The study projects that CULC libraries will see a significant number of their staff retire in the next few years. It is estimated that 11% will retire by 2009 and 35% by 2014. Fifty-seven percent of staff leaving by 2014 will be in supervisory or management positions. These rates are higher than in most other sectors.
- CULC libraries expect an increase in demand for librarians and paraprofessionals between 2003 and 2009.
- It is already evident that CULC libraries are having some difficulties in finding competencies in leadership and management.
- CULC librarians are less interested and feel less qualified than librarians in other sectors to take on management and supervisory responsibilities.
- While CULC libraries provide adequate training in some areas they are much less likely to provide training in leadership and management.
- Overall, the study indicates that in the short-term the professional librarian demand-supply equation does not suggest a crisis situation; however, all factors being equal, the longer-term picture suggests a librarian shortage.<sup>53</sup>

## Footnotes

<sup>1</sup> Example: D. Weiler. "Libraries face 'skills gap': 48% of librarians could retire by 2005," *Quill & Quire* 66 (2000): 10-11.

<sup>2</sup> 8Rs Study: 195.

<sup>3</sup> Paraprofessionals are defined as non-MLIS staff, excluding library clerks.

<sup>4</sup> *Ibid.*: 1.

<sup>5</sup> *Ibid.* Table B.2 Response Rate by Library Sector: 29.

<sup>6</sup> *Ibid.* Table B.7 Sample Size and Confidence Intervals by Library Sector: 34.

<sup>7</sup> *Ibid.* Table B.4 Librarian Representation by Library Sector: 30. *Ibid.* Table C.10 Age Category of Librarians and Paraprofessionals by Library Sector: 47.

<sup>9</sup> *Ibid.* Table C.10 Age Category of Librarians and Paraprofessionals by Library Sector: 47.

<sup>10</sup> *Ibid.* Table C.6 Career Stage of Librarians and Paraprofessionals by Library Sector: 43.

<sup>11</sup> *Ibid.* Table C.6 Career Stage of Librarians and Paraprofessionals by Library Sector: 43.

<sup>12</sup> *Ibid.* Table C.8 Percentage of Librarians Visible Minority and Aboriginal by Occupational Level and by Library Sector: 45.

<sup>13</sup> *Ibid.* Table C.2 Occupational Level of Professional Librarians by Library Sector: 39.

<sup>14</sup> *Ibid.* Table C.3 Occupational Level of Paraprofessional Staff by Library Sector: 40.

<sup>15</sup> *Ibid.*: 104.

<sup>16</sup> *Ibid.* Table I.1 Librarian Job Satisfaction by Occupational Level by Library Sector: 142.

<sup>17</sup> *Ibid.* Table I.3 Paraprofessional Job Satisfaction by Type of Position by Library Sector: 144.

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- <sup>18</sup> Ibid. Table I.1 Librarian Job Satisfaction by Occupational Level by Library Sector: 142. Ibid. Table C.10 Age Category of Librarians and Paraprofessionals by Library Sector: 47.
- <sup>9</sup> Ibid. Table C.10 Age Category of Librarians and Paraprofessionals by Library Sector: 47.
- <sup>10</sup> Ibid. Table C.6 Career Stage of Librarians and Paraprofessionals by Library Sector: 43.
- <sup>11</sup> Ibid. Table C.6 Career Stage of Librarians and Paraprofessionals by Library Sector: 43.
- <sup>12</sup> Ibid. Table C.8 Percentage of Librarians Visible Minority and Aboriginal by Occupational Level and by Library Sector: 45.
- <sup>13</sup> Ibid. Table C.2 Occupational Level of Professional Librarians by Library Sector: 39.
- <sup>14</sup> Ibid. Table C.3 Occupational Level of Paraprofessional Staff by Library Sector: 40.
- <sup>15</sup> Ibid.: 104.
- <sup>16</sup> Ibid. Table I.1 Librarian Job Satisfaction by Occupational Level by Library Sector: 142.
- <sup>17</sup> Ibid. Table I.3 Paraprofessional Job Satisfaction by Type of Position by Library Sector: 144.
- <sup>18</sup> Ibid. Table I.1 Librarian Job Satisfaction by Occupational Level by Library Sector: 142.
- <sup>19</sup> Ibid. Table F.2 Percentage of Librarians Interested in Spending Remainder of Career at Current Organization by Career Stage and Library Sector: 102.
- <sup>20</sup> Ibid. Table I.2 Librarian Job Satisfaction by Career Stage by Library Sector: 143; Ibid. Table I.3 Paraprofessional Job Satisfaction by Type of Position by Library Sector: 144.
- <sup>21</sup> Ibid. Table F.1 Departing Professional Librarians in 2002 by Library Sector: 100.
- <sup>22</sup> 8Rs Study: Table E.6 Predicted Librarian Retirements Within the Next 5 and 10 Years: 83.
- <sup>23</sup> Ibid.: 83.
- <sup>24</sup> Ibid.: 83.
- <sup>25</sup> Denise Davis. *Library Retirements—What We Can Expect*. (Chicago: ALA, [2005]). ([http://www.ala.org/ala/ors/reports/LSGradsPositionsAndRetirements\\_rev1.pdf](http://www.ala.org/ala/ors/reports/LSGradsPositionsAndRetirements_rev1.pdf)) (Accessed March 27, 2006.)
- <sup>26</sup> 8Rs Study. Table E.1 Librarian Retirements Between 1997 and 2002 by Library Sector: 78.
- <sup>27</sup> Ibid. Table E.2 Paraprofessional Staff Retirements Between 1997 and 2002 by Library Sector: 7.
- <sup>28</sup> Ibid. Table E.1 Librarian Retirements Between 1997 and 2002 by Library Sector: 78.
- <sup>29</sup> Ibid. Table E.4 Senior Librarian Estimation of Retirement Age Category by Library Sector: 81.
- <sup>30</sup> Ibid. Table E.7 Predicted Librarian Retirements with the Next 5 and 10 Years by Career Level and Library Sector: 86.
- <sup>31</sup> Ibid. Table E.8 Predicted Paraprofessional Retirements with the Next 5 and 10 Years by Library Sector: 87.
- <sup>32</sup> Ibid:92.
- <sup>33</sup> Ibid. Table E.14 Past and Future Ability to Replace Skills/Knowledge and Leadership Qualities Lost from Departing Senior Librarians by Library Sector: 93.
- <sup>34</sup> Ibid. Tables E.15a and 15b Barriers to Replacing Competencies Lost by Retiring Librarians by Library Sector: 94.
- <sup>35</sup> Ibid: 85.
- <sup>36</sup> Ibid. Table J.1 Net Gain/Loss of Librarians in Past Year by Library Sector: 168.
- <sup>37</sup> Ibid. Table J.2 Past and Future Demand Increase for Professional Librarians by Library Sector: 170.
- <sup>38</sup> Ibid. Table J.4 Past and Future Demand Increase for Paraprofessional Staff by Library Sector: 173.
- <sup>39</sup> Ibid: 173.
- <sup>40</sup> Ibid. Table D.1 Recruitment Need and Activity by Library Sector: 55.
- <sup>41</sup> Ibid. Tables D.2a and 2b Barriers to Recruitment by Library Sectors: 56-57.
- <sup>42</sup> Ibid. Table D.4a Rank of Ten Most Important AND Most Difficult to Fulfill Competencies When Recruiting Among Academic Libraries: 60.
- <sup>43</sup> Ibid: 75. Ibid. Table F.4 Career Interests of Professional Librarians by Career Stage, Career Level and Broad Library Sector: 105. (Breakdowns for CULC libraries are not included in this table.)
- <sup>44</sup> Ibid. Table F.6 Percentage of Librarians Self-Reporting as "Qualified" for Higher Position by Career Stage and Library Sector: 107.
- <sup>45</sup> Ibid. Table F.8 Percentage Offering "Good" or "Excellent" Promotional Opportunities and Limited Librarian Turnover as a Barrier to Promotional Opportunities by Library Sector: 110.
- <sup>47</sup> Ibid.: 110.
- <sup>48</sup> Ibid. Table H.3 Organization Provides Sufficient Opportunities to Participate in Training by Career Stage by Library Sector: 132.
- <sup>49</sup> Ibid. Table H.4a Training Experiences of Professional Librarians by Library Sector: 133.
- <sup>50</sup> Ibid.: 135.
- <sup>51</sup> Ibid. Table H.4b Training Experiences of Professional Librarians by Library Sector: 134.
- <sup>52</sup> Ibid. Figure F.1 Percentage of Senior Librarians Working at Current Library for More than 10 Years: 101
- <sup>53</sup> Ibid.: 171.

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## Transmittal Memorandum

### REPORT RECEIVED BY THE OTTAWA PUBLIC LIBRARY BOARD WITH NO CHANGES APRIL 20, 2009

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**Subject:** OPL Talent Plan Report: Succession and Leadership Planning

**Prepared by:** Barbara Clubb, City Librarian and CEO

**Prepared for:** Ottawa Public Library Board

**Received by the OPL Board:** April 20, 2009

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- OPL Strategic Directions and Priorities:** The Ottawa Public Library's 2008-2011 Strategic Directions and Priorities commits the organization to human resource management, performance management and the development of OPL's people: staff, managers, volunteers, members of the Board of Trustees, the Friends of the Ottawa Public Library Association, and the Ottawa Public Library Foundation. The recommendations in the attached Talent Plan Report support the implementation of those overarching directions and strategies as it pertains to the staff and managers of the Ottawa Public Library.
- Strategic Work Program '08:** The Ottawa Public Library 2008 Strategic Work Program identified the development of a retention and succession plan or Talent Plan as one of the important strategies under Strategic Direction E. *Be an accountable and efficient organization by strengthening efforts to recruit and retain staff.*
- Why a Talent Plan?** The Ottawa Public Library is, like many other public and private organizations, operating in an environment where:
  - There is an aging working population, many of whom are expected to retire over the next few years;
  - There is an increased challenge in finding those with the right mix of education, skills, knowledge, language, and characteristics to work for and remain with the organization;
  - There is a continuous need for ongoing skills and leadership development; and
  - Jobs, especially for those in management and supervisory positions, are increasingly more complex and faceted.

As a public library, OPL is challenged by the competition for library and information workers from other local libraries in the academic, government and special library sectors. OPL is further impacted by its requirements for bilingualism and the competitive size and strength of the federal government in recruiting and retaining information and library staff.

We know that the number of Canadians aged 55-64 jumped by 28% in the past 5 years to 3.7 million. The numbers of retirement-aged Canadians will continue to increase – in less than 10 years, 1 in 5 people in the workforce will be aged 55-64. In Canada, almost 50% of librarians are over the age of 50; 25% are expected to retire by 2009; 48% by 2014.

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4. **Process:** A staff working group consisting of the City Librarian, the Division Manager for Public and Support Services, the Staff Training Development Officer and the Library's Human Resources Consultant from the City was established to work with an external consultant to develop the Talent Plan Report. During that process the working group also consulted the experts and documentation available from the City of Ottawa, reviewed the current literature on the topic and reviewed working drafts of the Talent Plan report with a number of staff groups.

The final report was prepared by external consultant Vicki Whitmell, Executive Director, Information and Technology Services Division and Legislative Librarian of the Ontario Legislative Assembly (Government of Ontario). Ms Whitmell was engaged to assist us based on her experience and interest in succession planning and leadership development in libraries of all types.

Ms Whitmell is also the editor of *Staff Planning in a Time of Demographic Change* (Scarecrow Press, 2005) and is the organizer of the *Library Leaders Institute*, a program offered in Ontario for executive-level library directors and managers. She has given many conference presentations on talent plans and succession planning. Because Ms Whitmell is a provincial public servant, she worked with the Ottawa Public Library on a pro-bono basis.

5. **Report Overview:** The report contains an executive summary with 24 recommendations, a description of the Ottawa Public Library context and situation as well as the particular challenges the Library currently faces.

The appendix contains information from *The Future of Human Resources in Canadian Libraries, 2005 (the 8Rs Report)*. This major research report was developed by a team at the University of Alberta with financial support and consultation from many sectors of the Canadian library. Following the release of the report the then CLA President Stephen Abram established a President's Task Force on the 8Rs report to develop national strategies to support implementation of a number of the recommendations in the report. The information in the OPL Talent Plan appendix refers specifically to 8Rs data pertaining to large public libraries in Canada. The 8Rs report was specifically referenced in the Board's Strategic Plan.

The OPL Talent Plan Report acknowledges that the Library already has some of the elements of a Talent Plan in place. It also emphasizes that by following the recommendations the Library will be able to establish a key program that will help it to prepare for the loss of knowledge and skills of those retiring and will make certain that OPL staff are ready to take on changing and challenging roles.

The OPL Talent Plan Report was designed to address all staffing levels but there is a particular focus on management and librarian levels as this is where there is the most urgent need to address succession, retention and leadership development in the near future.

The recommendations in the report build on existing initiatives such as bursary funding, training and development programs, recognition and peer awards and existing staff committees such as the Staff Investment Team (SIT). The recommendations have been designed to strengthen staff commitment to, and knowledge of the Library and its staffing needs, emphasize the need for career planning and development and knowledge transfer at the individual staff level, and strengthen the organization's ability to recruit and retain staff with the needed competencies and skills.

6. **Non-Reduced Retirement Projections:** In conjunction with the development of the OPL Talent Plan, the Human Resources department of the City of Ottawa has worked with us to

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help project human resource requirements over the five year period 2008-2012. They have provided "point in time" data regarding % of staff eligible to retire with an unreduced pension. Their advice is not meant to be a final predictor of final retirements as the choice to retire is a very personal and individual one. An employee's decision to retire may include their OMERS eligibility criteria, access to other pension income, personal, financial, health and social needs as well as the state of the world, national and provincial economies. Employees are not required to provide any long range indication of their retirement intentions. In Ontario, it is no longer mandatory to retire at age 65.

In summary, we know that as of October 30, 2008:

- a. 66 or 9.65% of the Library's workforce could retire with a non-reduced pension by 2012. The top categories of positions are: supervisory-all levels (17), librarian (13), public service assistants (12), and management (9). The analysis does not include employees who may choose to retire with a reduced pension as most employees choose to retire under "non-reduced" or "full-pension" criteria. For the City of Ottawa this number is 10.89%. For the City Operations Department this number is 8.20%; for the Infrastructure Services and Community Sustainability Department this number is 15%.
- b. The average age an OPL employee is eligible to retire with a non-reduced pension is 61.5 years. For the City of Ottawa – City Operations Department this number is 59 years; for the Infrastructure Services and Community Sustainability Department this number is 56.5 years; for the Ottawa Fire Service this number is 54 years.
- c. The percentage of management vs union possible non-reduced retirements by 2012 for the OPL is: union 86.36% / management 13.63%; for the City of Ottawa it is union 93% / management 7%.
- d. In addition HR has advised us that as of March 31, 2009, 27.7% of the OPL workforce is over the age of 55 compared to 12.9% for the City of Ottawa; and that 48% of the OPL managers are over the age of 55; that the Library had 7 retirements in 2008 and to date there have been 3 retirements in 2009.

This situation presents a number of opportunities and challenges for OPL including:

- The opportunity to refine and/or realign the management structures as attrition occurs, with minimal impact to the organization
- The challenge to develop recruitment and retention strategies to attract and retain staff as well as incentives to work beyond age 55
- The opportunity to review job descriptions of key front line staff, develop succession plans, encourage continuing education for progression, and increase outreach and diversion in recruitment and selection

7. **Next Steps:** Following distribution of the report, a multi-year action plan will be developed to address prioritized recommendations, taking into account resources available. This will be in conjunction with and consideration of the completion of the Strategic Organizational Review to be carried out in 2009.

In the meantime the following strategies will be continued and/or implemented:

- a. The new Employee Orientation Manual will be distributed and used in orientation and training of new employees.

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- b. The funding from the Ministry of Culture Library Credit fund (\$165k/2 years, for Ottawa Public Library) will be used to enhance training in key areas such as AODA (Accessibility for Ontarians with Disabilities Act). A proposal will be coming forward for board approval in June 2009.
  - c. The Staff Investment Team (SIT) and its subcommittees will begin implementing the recommendations from their work over the past 18 months. For instance, this includes the development of a mentorship program.
  - d. The OPL Bursary program established in 2008 will continue to dispense funds to staff who apply for support for both para-professional, library professional and other related training and courses. The Friends have also established a bursary program at the University of Ottawa for the Information Studies program; it is not restricted to OPL employees but applicants must live in the National Capital Region when they apply for funding.
  - e. OPL will continue to exhibit at career fairs in Ottawa, Toronto, Montreal and beyond and at select library conference career days and venues e.g. Ontario Library Association Super-conference (Toronto 2009 and 2010) and the Canadian Library Association Conference, Montreal 2009).
  - f. The Joint Professional Development Committee and its sub-unit of the new librarians group will continue their work.
  - g. Managers, working with the Library's HR officer will begin to create job postings that more specifically detail the type and focus of the position being advertised.
  - h. OPL will continue to work closely with the library education programs at the University of Ottawa (School of Information Studies) and Algonquin College Library and Information Technician Program.
  - i. OPL will establish its first co-op position
  - j. OPL will take full advantage of the City of Ottawa Learning Centre programs in particular the Supervisory and Management Development programs. For instance, beginning in June the Learning Centre will introduce a new program called *Growing Leaders for Service Excellence*. This program is described as a "continuous learning roadmap to equip leaders at all levels of our organization with the skills required to excel at five unique stages of leadership. In each of the Leadership Development Certificate streams participants will be required to complete the entire core curriculum and 2 elective workshops. Ongoing e-learning support is also provided for each stream. The five programs are: (1) Emerging leaders: preparing for your role (2) evolving leaders: developing your strengths (3) experienced leaders: expanding your role (4) empowered leaders: thinking strategically (5) executive leaders: driving the culture. The program has elements for both bargaining unit supervisors and managers. Depending on previous training taken, for some staff this program will be optional while for others it will be mandatory.
  - k. We will again recommend increased funding for staff training and development in the development of the 2010 OPL operating budget. This will be critical to ensure a robust implementation of the OPL Talent Plan.
  - l. We will continue to recognize staff through peer recognition, Bravo cards, long term service awards, staff newsletters and board reports.

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