



CANADIAN LIBRARY HUMAN RESOURCE STUDY
ÉTUDE SUR LES RESSOURCES HUMAINES DANS
LES BIBLIOTHÈQUES CANADIENNES

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EXECUTIVE SUMMARY

This proposal outlines the plan for a comprehensive study of the state of library human resources in Canada. Much anecdotal literature has been written in the United States about recruitment, retention and leadership in the library profession, based on aggregate statistics gathered from such sources as the professional associations and federal statistics bodies. However, there is a glaring lack of primary data, or even aggregate statistics, to contextualize the current Canadian situation. Without such data, strategic decision-making on the part of individual library administrations could be fractured, uninformed, and ineffectual. The proposal outlines an in-depth study of the eight elements that the current literature raises as necessary to address the impending human resource shortage in librarianship: recruitment, retention, remuneration, repatriation, rejuvenation, reaccreditation, retirement, and restructuring (the 8Rs).

The study will provide the groundwork for national coalitions and partnerships between librarians, library institutions, library and information studies programs, and library associations to determine if a shortage will occur, and the changes and potential opportunities this may bring to the forefront of the industry. The study will also present a standard with which individual libraries can assess their preparedness for emerging employment trends in; this will allow them to take an unprecedented opportunity to review the effectiveness of current institutional and professional human resource structures. Individual librarians will also benefit from the groundwork laid by the study, as the industry becomes more cognizant of and responsive to librarians' professional needs. Finally, the study will seek to provide libraries and library managers with the tools and resources at an institutional level, so that they can effectively address the implications that arise from the current and future changes in the library sector.

The 8Rs Research Team, while focusing in an in-depth manner on libraries and librarians, will expand the study to research on the museums and archives heritage sub-sectors in Stage 1 of the project, as a contract awarded by the Canadian Council of Archives, the Canadian Museums Association, and the Canadian Library Association.

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I. LITERATURE REVIEW AND CONTEXT

Introduction

A major factor in the library profession's ability to respond to challenges posed by the rapidly-changing knowledge-based economy is that of an educated and skilled workforce. Greater demands and opportunities will be placed upon information professionals in all sectors as knowledge and innovation continue to act as key drivers of the world economy. The ability of institutions to recruit, retain and develop a committed and talented workforce will determine the ability of Canadian libraries to participate fully in the development of the new economy, as managers of information and knowledge. An adequate number of skilled professionals is necessary to address these challenges; however, anecdotal evidence predicts that numbers of professionals retiring over the next ten years is exponentially greater than new librarians entering the field. Furthermore, there appear to be inadequate numbers of mid-career staff who are prepared to fill leadership and administrative vacancies.

While there appears to be no extensive study of the library field's demographics, signs point to the coming exodus.

Derek Weiler, "Libraries Face 'Skills Gap': 48% of Librarians Could Retire by 2005." *Quill & Quire*, 66:1 (2000).

This proposal outlines the key elements of a study that will investigate whether there will indeed be a potential crisis in staff supply and demand, and further, will examine library institutions and library staff in order to gain a comprehensive view of the system on a national basis. The research team proposes to take this examination as the first extensive study of the library sector: it will examine current and projected factors of supply and demand, as well as the points at which those factors intersect. While the study is national in scope, it will provide concrete strategies and data at local levels for individual managers and libraries to examine their short- and long-term human resource plans, as well as the effectiveness of their own institutional structures.

Literature Review

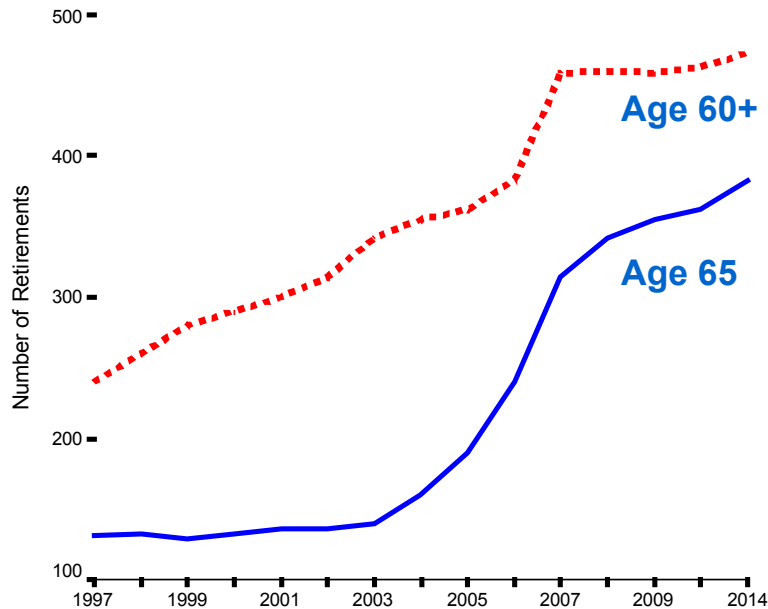
Many library professionals are currently expressing their concerns about a lack of succession management in the library industry, and thus anticipating a potential crisis in staffing over the next five to fifteen years. This concern is based on the fact that as librarians and library workers near the eligible age of retirement (60 years and over), there will be a lack of trained and experienced professionals and paraprofessionals to fill the vacancies created. This general concern is supported in part by the study done by Wilder (2000), where a minimum of 48 percent of academic librarians in North America were noted to be entering retirement age over the next fifteen years.

Statistics from the 1996 Canadian census point to some general trends. A best-case scenario would result in a total of 200-400 librarians retiring each year in the Census Metropolitan Areas (CMAs), from 2002-2014. This assumes that retirement will be taken at the age of 65. If librarians retire at 60, annual retiree totals would be between 300-500 each year, for a total of 4,000 retirements over the period 2002-2014. After the year 2006, there will be double the number of librarians turning 65 than in the previous ten years; retirement levels will be greatly accelerated thereafter.

The census further shows that professionals over the age of 45 make up the largest age group in the field; in 1996, they made up 50 percent of the total library workforce. This can now be updated with 2001 data and over time comparisons. Curran (2002) has noted that the decreased capacity for hiring younger librarians over the last twenty years (due in part to sustained budget cuts) has created a situation where the majority of the library workforce is concentrated into an older age demographic.

Projected Number of Retirements per Year (at age 60 & 65)

Based on Projections for All Librarians in CMA's from the 1996 Canadian Census



Higher education, academic libraries included, provides mentoring and gives others a chance to obtain progressively higher level positions, but there is not a clear internal plan for obtaining a library director's position.

Ruth J. Person and George Charles Newman, "Selection of the University Librarian." College and Research Libraries. 51 (July 1990).

To complicate this situation, there are questions as to the numbers and potential career paths of entrants into the library industry. Total numbers of MLIS graduates in the United States have been called "stagnant," with little hope that American Library Association-accredited MLIS departments will be able to increase the number of students they can accept (Jacobson 2002). Further, as more industries reform themselves to work within the knowledge economy, there are incentives for new professionals that may draw them away from the traditional library sector.

Issues of leadership training and development at all stages of librarians' careers have been relegated to the margins of human resource management in Canadian libraries. Budget cutbacks have resulted in the elimination or merging of middle and senior positions as they become vacant, therefore limiting the numbers of positions to provide leadership grooming for mid-

career librarians, as well as limiting the number of leaders who could act as their mentors. The result is what Curran calls the “obstruction of the ‘natural’ progressive promotion conveyor belt for librarians leading to senior administrative positions.” The question arises as to whether there is are adequately trained and experienced staff ready to fill positions created by upcoming retirements.

There is little information on recent MLIS graduates and their career progressions, other than data from placement surveys carried out by individual School of Library and Information Studies (SLIS) programs in Canada. There are a few surveys, such as the annual University of Alberta SLIS Employment Survey, that collect data on numbers of graduates working in different library sectors and geographic locations, but do not delve into the questions of why students have chosen these career options.

The data to support the changing trends in the library sector are generally anecdotal and vague at best, or on too small a scale to make greater applications of data across the industry. While census data indicate current trends in the library profession, many other questions are left unanswered. Are current librarians intending to retire earlier than 65? What are the career motivations of mid-career professionals? Why do new professionals seek employment outside Canada? How do we address trends both at the level of individual institutions and industry-wide?

Much of the literature on librarian supply-and-demand is written from the American context. Some predictions of an impending shortage of librarians have been supported through aggregate statistics from national surveys, as well as statistics gathered from professional associations such as the American Library Association (ALA) (St. Lifer 2000). Most studies, however, rely primarily on anecdotal evidence in the form of shortage profiles in particular library sectors; these profiles thus lack comprehensive quantitative data on the numbers of professionals beginning and ending their careers. The literature makes continuous reference to this informal method of gathering evidence; writers have stressed the need for a more

Other disciplines have criticized library literature over the years as being too anecdotal and too little based on hard research... opportunities abound for basic research in almost every area of academic library recruitment.

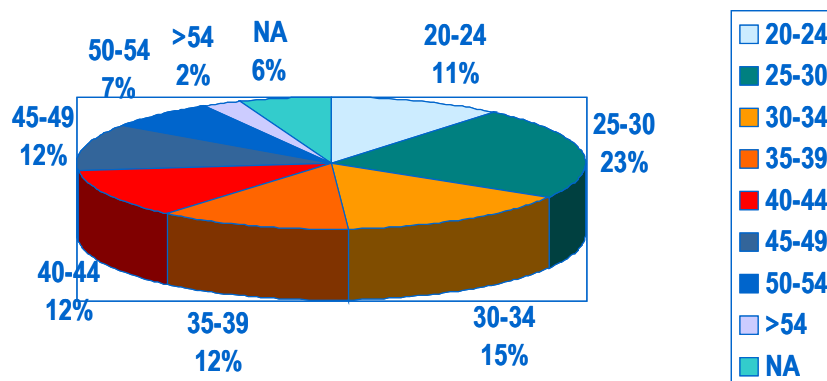
David M. Harralson, “Recruitment in Academic Libraries: Library Literature in the 90s.” College and Undergraduate Libraries. 8:1 (2001).

systematic exploration of the situation (Bridgland 1999, Canadian Culture 2000, Weiler 2000, Harralson 2001, Van Fleet and Wallace 2002, Lynch 2002). However, there is enough anecdotal evidence that the ALA is seeking to address the predicted shortage through the establishment of a Recruitment and Diversity Task Force (Berry 2002).

The American literature outlines a number of sectors that are currently experiencing staff shortages, such as elementary and secondary school libraries (Everhart 2002), children's programming and cataloging (Moran 2001, Hauge 1997). A few studies have been conducted in specific areas of the industry, such as cataloging, to discern reasons for the lack of professionals (Callahan and MacLeod 1994). The Callahan and MacLeod study, while specific to that sector of librarianship, does explore some reasons for shortages that may be applicable across the industry; these reasons include the perceived low status of librarianship, as well as salary limitations. There are also fewer graduates specializing in academic librarianship in the United States (Jacobson 2002). Some of the reasons proposed for this shortage are barriers such as the comparatively low salaries of the academic library sector and the rise of dual-career couples that decrease mobility (Kaufman 2002).

Industry-wide, proposed reasons for the anticipated shortage include more lucrative opportunities within the internet sector (Lord 2000, St. Lifer 2001) and a "stagnant" number of MLIS graduates (Jacobson 2002). It would appear that the situation is arising from the convergence of factors. MLIS graduates also tend to be older than most Masters' students; over 50% of Canadian MLIS graduates are over 35 years of age. While this may not appear to be an immediate concern, it does create shorter careers on average, meaning librarians may be older when they achieve management positions than in other professions and thus have fewer years to spend in these positions. Academic librarians as a whole are also older than in other professions, and Canadian academic librarians are older than their American counterparts (Wilder 2000).

Ages of Students Enrolled in Canada and U.S. MLS Programs, Fall 2000



*based on total of 13,127 enrolled. Note: Pratt, Western Ontario and Toronto data not available. Source: ALISE Library and Information Science Statistical Report 2000.

The literature often intersperses discussion of how to fill a librarian shortage with the need to address diversity issues (Howland 1999, Berry 2002, Kaufman 2002, Acree et al 2002). The library sector is seen as not creating enough opportunities for women and minorities, both at entry-level and in higher management. From a Canadian perspective, this has particular relevance with the Human Resources Development Canada (HRDC) prediction that by 2011, all net labour force growth in Canada will be supplied by immigrant workers (Achieving Excellence 2002). This prediction foregrounds further questions about accreditation and librarian degrees received outside Canada, in terms of the extent to which Canadian libraries recognize and make the best use of the qualifications of immigrant librarians.

In addition, the library education system itself has come under scrutiny (Moran 2001). A number of American library schools have been closed over the past two decades, and accredited schools easily reach their quotas for students, which in turn limits motivation for active recruitment. Given this competitive admission situation, some authors state that recruitment is not an issue for the schools (Van Fleet and Wallace 2002). Others claim that the low status of the profession is hampering recruitment of students with excellent potential (Sager 1998). Again, these conclusions are drawn from anecdotal evidence rather than from formal investigation. The question of whether an MLIS degree from an accredited school is the most appropriate requirement for a library career has also been raised by some

(St. Lifer 2000); this question also examines the possibility of restructuring the roles of librarians and paraprofessionals.

Despite the wealth of literature on succession planning or succession management and its importance to organizational health and success, there is a paucity of literature on succession planning in libraries of any type....

Angela Bridgland. "To Fill or How to Fill – That is the Question: Succession Planning and Leadership Development in Academic Libraries." Australian Academic and Research Libraries. 30:1 (1999).

Bridgland (1999) profiled the University of Melbourne's efforts to address its library's professional shortage and lack of diversity, and to create a system of succession planning. She defined succession planning as a proactive effort that makes provision for the development and replacement of key staff over a period of time and ensuring leadership continuity. She noted that succession planning is vital for academic libraries' sustained health: "...the continued survival of the organization depends on having the right people in the right places at the right times."

The author outlined the features and benefits of succession planning, which include creating increased opportunities for newer professionals, improving employee morale, easing restructuring or downsizing actions (and position termination), as well as the creation of a larger pool of promotable employees. She noted, however, that unless there is strong support from top management and a willingness to work with a long-term plan (as opposed to a quick-fix solution), this approach would not be effective.

Bridgland concluded that without succession planning strategies, libraries will not succeed in a competitive, information-based global economy. Bridgland's study, while ending with this caveat, in fact outlines the possibilities for a rejuvenation of individual libraries and their methods of human resource management and structures. The process of long-term planning and the creation of new development strategies for newer librarians and minority professionals are a means to allow the library to examine how it supports and invests in employees. Bridgland presents the University of Melbourne's proactive approach as turning potential crisis to opportunity.

The British Library commissioned a two-year study of the public library system in the United Kingdom with regard to recruitment, retention and leadership development (Usherwood et

al. 2001). The study found both positive and negative factors associated with retention. An example of a positive factor is the potential the employee saw for promotion and development at their institution. Negative factors included the employee staying at their institution due to perceived limited opportunities outside the library. These negative factors accounted for 20% of all respondents' reasons for staying at their jobs.

Studies of supply and demand should certainly be carried out at the national level with consolidated support to ensure the quality and reliability of such studies.

Connie Van Fleet and Danny P. Wallace. "O Librarian, Where Art Thou?" *RQ*. 41:3. (2002).

This study also found four principal causes of vacancies within the British public library system: movement within the profession, movement within services, retirement, and restructuring of positions. The least frequent reasons for vacancies were expansion, the creation of new positions, or staff moving to other information sectors outside librarianship. Some respondents noted that vacancies at their library did not occur. Half of the organizations surveyed had not recruited new staff within the previous year.

Public library authorities that responded to this study noted that they hire for specific qualities, skills or abilities in candidates, as opposed to a single qualification (such as an MLIS); this fact further questions the traditional view that accreditation is valued above competencies in the profession. The authors suggest that this has resulted in a "decline in professionalisation" of the status of the MLIS degree, overall. They also concluded that staff retention mainly occurs by default rather than by positive reasons for staying in the profession. The authors warn that this could contribute to a high level of staff dissatisfaction. A major reason for limited staff retention involves frustration with the specific organization itself. The authors propose, "[It may be that] the profession as a whole is stagnant and the reasons why staff are not joining other sectors may be for example, that they perceive their skills are not transferable." They suggest further study of other industries in terms of recruitment and retention so that a comparison may be made with the library sector.

While the literature from other countries is useful in providing frameworks for investigation, the fact remains that there is no substantial Canadian study that tabulates quantitative data

on the profession, much less the qualitative responses that could provide insight into the needs of libraries and library staff. While the literature as a whole has emphasized the need for concentrated study of human resource supply and demand in the library sector, Canadian statisticians in particular note the “dearth of statistics examining the way the [library] sector is changing” (Statistics Canada 2001), when compared to other heritage professions. This is even more alarming when it is noted that the Canadian heritage professions do not keep in-depth statistics on their institutions, industry-wide.

There is a dearth of statistics examining the way in which the [library] profession is changing.

Canadian Culture in Perspective: A Statistical Overview.
Ottawa: Statistics Canada, 2000.

There is an additional pressure on the library industry in this country in the form of Canadian MLIS graduates’ access to the job market in the United States. There are many factors that may influence these professionals’ decisions to leave Canada for employment; these include the much larger and often more lucrative job market in the United States, a more diverse array of professional opportunities, and the strength of American currency for students seeking to relieve heavy education-incurred debt loads. The exact number of Canadian graduates working in the United States is not known.

A research team commissioned by the Corporation de bibliothécaires professionnels du Québec completed a study on the risk of a librarian shortage within the province, predicting anywhere between 240 and 500 professional librarian positions that will need to be filled between 2001 and 2005 in various sectors. Forty-four percent of these anticipated positions are predicted to be in the university sector, which has a strong advantage over public and school libraries, due to universities’ strong employee benefits programs. The study also noted that approximately 25% of graduates from MLIS programs from McGill and the University of Montréal find employment outside traditional library settings; further, a number of graduates achieve employment outside Québec, due in part to the strong presence of American recruiters on the McGill campus, for example.

The recent small-scale survey conducted by the Canadian Library Association (2002) investigated 124 libraries’ anticipated retirement levels, and their self-assessed preparedness for filling these vacancies. Twenty-one percent of respondents felt “not at all

prepared,” and 53% felt “somewhat prepared.” However, when asked about their strategies for succession planning, “no strategies developed” was the second most frequently-stated response. In addition, when asked about what the CLA could do to assist with addressing the situation, the most frequent response was “nothing.” This small sample may indicate a lack of understanding of the steps needed to address the potential shortage, as well as a lack of faith in the national association’s ability to act as a leader to build a comprehensive strategy. The authors of the study note their results are “far from conclusive,” and suggest further investigation to provide useful data.

Investigating the demand side of the industry, Harris and Marshall undertook a 1998 survey of 7 directors and 182 librarians (including front-line professionals, middle management, and senior managers) in major public and academic libraries. Results suggest that librarians are increasingly expected to perform generalist management roles to the diminishment of their core skill sets that have traditionally defined the profession. The skills and decision-making responsibilities that were once the domain of professional librarians have been re-deployed down the staff hierarchy to paraprofessionals. The resulting changes to the staff compliment of the library, according to these analysts, is the "compression" of professional library staff and a reduction in the need for professional librarians (1998). This research suggests that larger paradigmatic shifts are currently taking place within the sector. While succession management may indeed be an overlooked area within libraries, the pressures on the library sector and its resulting reorganization may complicate an attempt at a simple examination of supply. Thus, the research requires a thorough understanding of how many librarians are entering and exiting the industry in Canada as well as the demand factors that may limit or expand the need for professional librarians.

The recent study from the Cultural Human Resource Council (CHRC) contained an excellent framework for investigating human resource issues within the cultural sector as a whole; identified issues include technology, funding, and ongoing training as common to all sub-sectors of the cultural industry. The study predicted that upcoming issues specific to the library sub-sector include challenges of “demographics, globalization, the strategic value of information, technological change, the number of client groups and their independence” (2002). At the same time, the study confirms the need for a sound statistical analytical

framework and standard indicators for the cultural sector; the '8Rs' research will build upon the strengths of the CHRC study with respect to the library sub-sector, and start to create a more complete picture of specific influences on library human resources.

Further, the '8Rs' Research Team's investigation of the library sub-sector will expand to include museum and archive sub-sectors for Phase II, Stage III of our methods plan (see p. 26). The '8Rs' study addresses a number of the recommendations from the *Face of the Future* study, including the definition and promotion of a healthy human resource culture within the sub-sector; supporting the continued recruitment, development, retention and succession of cultural management; and ensuring the inclusion of all cultural workers in all aspects of cultural sector activities. Many of the actions contained within the final recommendations are encompassed within the library sub-sector by the '8Rs' study.

Implications of Literature for 8Rs Study

The volume of anecdotal evidence may be a convincing indication that there are potentially disastrous human resource issues looming for the library sector in Canada. This evidence does indeed warrant further investigation to collect hard data with which to map both the major influences and their implications; however, action undertaken without a larger study would be premature. Only from this point may supported recommendations be made and a comprehensive action plan undertaken. With hardline data on the state of the industry, Canadian libraries can turn the threat of a crisis into the opportunity for rejuvenation of their individual institutions, the sector and indeed, the profession.

“...more study is needed to identify trends in the library community...[and] should include sampling a larger library population, identifying geographical trends and sources of supply...and so on.”

Summerfield, “CLA's Human Resources and Succession Planning Survey: Analysis and Recommendations.” Feliciter 48.4 (2002).

With the current trend predictions, a national strategy that can be tailored to individual libraries will be the most effective and efficient method of response. However, with the lack of comprehensive Canadian industry statistics, there is no foundation upon which to build an effective national strategy with which to meet industry needs. The situation implicates libraries across the country, and within every field. It also implicates professionals at all

stages of their careers: MLIS students and educators, paraprofessionals, new professionals, mid-career professionals, senior management, and those about to retire. It also has implications for Canadian librarians working outside Canada, as well as those working outside traditional libraries.

The proposed study therefore should not investigate only questions of retirement; it must include the full range of librarians in all stages of their careers. Such a comprehensive study also requires the support and participation of municipal, regional and national professional associations. While the study will be national in scope, it must seek to provide deliverables

...sources of information regarding shortages of library professionals are anecdotal...as compelling as these bits of information may be, there is clearly a need for a source of accurate, up-to-date information regarding the real need for library professionals and the extent to which that need is being met.

for libraries of varying sizes and financial resources. Therefore, a final outcome of the proposal is the creation of a toolkit that includes current and planned strategies for individual libraries, as well as key recommendations that arise from the study analysis. This will provide practical methods for other libraries to employ; it will also assist with wide dissemination of information on innovative practices between institutions, and help create a national dialogue around these issues. Furthermore, the resulting data from the study will be analyzed at local levels, particularly with regard to the CMAs, Metropolitan Adjacent Areas (MAAs), and the Hinterlands; this will allow individual libraries the specific data needed in order to assess their own situation against that of the industry ecosystem.

Connie Van Fleet and Danny P. Wallace. "O Librarian, Where Art Thou?" *RQ*. 41:3. (2002.)

Based on the anecdotal evidence presented, there may be a temptation to proceed directly to an action plan without further study. Indeed, individual libraries have made succession plans toward addressing their human resource needs; for example, the University of Manitoba's document, "Recruitment and Retention: Toward a Strategy for the University of Manitoba Libraries" (2002). The Ottawa Public Library and the University of Alberta have also started to address this situation on an institutional level. However, the factors previously suggested as contributing to the supposed shortage only give an indication of what might happen, not what is likely to happen, or the reasons why; individual succession

plans are of a certain benefit, but do not address wider concerns for the industry, and may not recognize the influence of key factors that will be uncovered through a large-scale study.

Further, as Harris and Marshall noted, the library organizational structure is changing rapidly with the advent of new technologies and budget cutbacks; research that focuses solely on the side of supply would be short-sighted in its approach. Changes in the library workforce are arising from the convergence of a number of factors; the influence of each of these factors, and the ultimate outcomes are unknown. Without understanding the proportional influence of each factor on the situation, there is no clear course of action. Further, a strategy created without the data to support it may misplace resources, thus exacerbating the problem.

It must be acknowledged that with such a number of potential factors, the most effective strategy will be multifaceted, and must contain adequate depth as well as breadth. So that resources are not unnecessarily wasted in the library sector, a comprehensive study of the library landscape in Canada is an essential piece of groundwork that will fundamentally inform all attempts to address the human resource issues for the Canadian library industry over the next generation.

II. PROJECT OUTLINE

A comprehensive survey is proposed of new, mid-career and senior professionals and paraprofessionals in public, academic, school, and special libraries, as well as in SLIS programs. The survey will accumulate both qualitative and quantitative data that summarizes needs of both individual institutions and the industry as a whole with regard to attracting and retaining high-quality staff, as well as an environment that provides ongoing challenge and development opportunities.

Aims:

- To provide the first comprehensive, industry-wide investigation of issues around recruitment, retention, remuneration, repatriation, rejuvenation, reaccreditation, retirement, and restructuring (the '8 Rs') in the Canadian library context.
- To provide a resource kit that will assist individual libraries with the necessary data for assessing and addressing their own human resource needs in a proactive manner.
- To provide the necessary data for an efficient, effective and national strategy on the part of both institutions and professional associations to address the impending crisis of staffing within the next five to ten years.
- To assist with the building of coalitions on a national level that will be able to share resources to address the professional human resource situation on a long-term basis.

The three broad research questions for this study are:

Supply:

1. To what extent is an impending shortage of librarians because of an aging demographic exacerbated by a decreasing supply of new recruits?

Demand:

2. What are the major causes of change within the library system and how have they changed the functional requirements and organizational restructure of library operations and, ultimately, the role of and demand for librarians?

Supply + Demand:

3. How does a decreasing supply of professional librarians (1) fit with a changing demand in library operations and for librarians (2)?

In order to assess the effect of the factors of supply and demand on the greater library human resource picture, there are a number of needs to be considered:

- attracting the 'best and brightest' to the profession
- attracting and retaining talented recruits to all types of libraries e.g. schools as well as post-secondary institutions
- an examination of the role of the paraprofessional or functional specialist vs. the credentialed professional

In light of these needs, the study will answer a number of relevant questions, not the least of which is to more definitely establish the extent to which the supply-demand imbalance is a current or future problem. The study will cover these eight major areas of inquiry:

Recruitment: This section will investigate recruitment issues both at the graduate degree level in SLIS programs and for new professionals in the workplace. How many SLIS graduates are anticipated over the next ten years? How does this compare to paraprofessional graduates? How many new hires have Canadian libraries recently made? How do SLIS programs recruit? What are SLIS programs strategies to ensure they enroll candidates with excellent potential for the profession? What are libraries' strategies to attract strong candidates? Are there diversity initiatives from SLIS programs and libraries?

Retention: How many Canadian libraries offer professional development to employees? Who are these programs aimed toward (i.e. recent entrants or mid-career librarians)? Are there development programs offered for paraprofessionals? What are experiences of newer and mid-career professionals in libraries with regard to career progression and mentorship? What are libraries' financial abilities to fund training programs? What do librarians see as the major factors that encourage staff retention?

Remuneration: In this section, we will investigate the extent to which salary is a motivating factor for individuals at various stages of their careers. What are professional salaries compared to those of paraprofessionals? What are salary expectations of each over the course of their careers? Does salary play a greater role for new professionals, mid-career, or senior librarians? Is salary a greater motivating factor in light of increased opportunities for librarians in non-traditional, higher paying industries? If so, how do library administrators envision their ability to compete with these other industries?

Repatriation: This section examines reasons behind the numbers of Canadian librarians who seek and obtain work in the United States, as well as those MLIS graduates who obtain work outside the library sector. What age groups are seeking employment outside of Canada? How many Canadian librarians are currently working in the United States? What are the motivations of Canadian graduates who seek employment in the United States? What are the longer-term plans of Canadian expatriates in the US (i.e. are they just paying off education debt loads and planning to return? What would make them want to return to Canada?) How many librarians have chosen to work in sectors other than traditional libraries? How do salaries outside the library sector compare with those in other industries? What are librarians' motivations for this move?

Rejuvenation: This section pertains to librarians in the mid-career stage and nearing retirement. How many librarians are initiating innovative services and programs during this career stage? What are their motivation levels? What are current libraries' practices with regard to encouraging innovative services and practices at the senior level? What resources do libraries allocate, if any, for this purpose? What do mid- and senior level librarians want in terms of motivational strategies and practices to rejuvenate their energy and innovation levels at their workplaces? Are libraries and professional associations identifying and working toward future competencies?

Reaccreditation: As MLIS programs and professional institutions respond to changing information needs of users, professional competencies of librarians also change. This section will explore the extent to which institutions and individuals are articulating their vision of appropriate accreditation and competencies for the realities of the industry. Is

there a need for undergraduate Library Studies degrees? How different are programs that focus on traditional MLIS areas of interest and those that focus on new technologies and computing skills? Do schools with a high-technology focus want a different accreditation? To what extent does the common perception of the MLIS degree and 'librarians' contribute to this? How does the industry recognize those who are educated through non-accredited distance-learning programs? To what extent do libraries and professional associations recognize immigrant professionals who hold a librarian degree from outside North America? If not, how are they working to dismantle some of the barriers immigrant librarians face?

Retirement: This section will examine some of the questions around retirement trends in the profession. How many librarians intend to retire at 65, and how many intend to retire earlier? How will libraries deal with filling these vacancies? Will the positions stay open, or will libraries close them under budget constraints? What kinds of strategies are in place from individual libraries in terms of retention incentives for librarians who are approaching minimum retirement age? What would librarians consider as incentives to remain in their positions until 65?

Restructuring: An examination of professional librarians and paraprofessionals will be the focus in this section. How many librarians are entering the workforce as compared to paraprofessionals? What are the typical job duties of professionals vs. paraprofessionals? How does each see their role and status in relation to the other? Where do their duties overlap? Are libraries considering restructuring these roles? Are there potential points for collaboration between libraries, SLIS programs, and technical schools to ensure that the roles of professionals and paraprofessionals complement each other? How are libraries approaching this opportunity in a proactive manner?

Key Elements of the Study:

- Review of relevant literature
- Compilation of existing data
- Survey of library administrators
- Survey of library management

- Survey of mid-career library professionals
- Survey of new professionals
- Survey of paraprofessionals entering the workforce, in mid-career, and nearing retirement
- Survey of library schools
- Survey of post-secondary students regarding their perceptions of librarianship
- Wide dissemination of the data
- Setup of a national dialogue around the study
- Creation of a comprehensive toolkit for individual libraries

Outcomes

The final report will summarize and analyze the data collected by the surveys, and provide an assessment of both librarians' career development needs and a Canadian-wide picture of the current state of affairs, thus allowing the identification of areas that require immediate, concentrated effort and points of opportunity for change. This report will then function as a starting point for coalitions of libraries and professional associations to plan and implement appropriate strategies that will address the state of the industry in both the short- and long-term. Primary data will be available to individual libraries, analyzed so as to be relevant to local trends as well as national trends.

The study will be the first major Canadian collection of data that will provide the sector, as well as individual institutions, with tools for long-term planning, as well as strengthening partnerships between educators, libraries in various sectors, and regional and national associations. This coalition will also provide the sector with leverage and a unified vision that could assist with securing funding from federal sources to put some of the final recommendations into practice.

The study will provide the following for planning purposes:

- Extensive literature review of current human resource supply and demand management approaches from both the non-profit and private sectors, and from libraries in different sectors
- Information on key points for libraries to address to recruit and retain excellent staff
- Examination of librarians' roles and duties vs. those of the paraprofessional, with the identification of opportunities to restructure roles if needed
- Frameworks and data to assist with short- and long-term planning, both as singular institutions and in conjunction with other institutions in the sector
- Raw data at both national and regional levels, in order to provide both the picture of the industry landscape as well as pictures of the CMAs, MAAs, and Hinterlands
- Data analysis by geographical district (for additional fees)
- Clear outline of priorities on which both individual institutions and regional and national associations can work together for short- and long-term planning in human resource supply-and-demand
- Concrete tools and resources for individual institutions to address their immediate and long-term human resource needs; including both best practices suggested by the study, and practices undertaken by individual libraries at this time (e.g. University of Manitoba libraries, University of Alberta libraries)
- Communication networks for information sharing between libraries on management and succession planning tactics
- Primary research document that is beyond the capabilities of the individual professional associations or individual institutions
- Leverage for institutions and associations to work together to obtain necessary resources that will address current and future trends on a sector-wide level
- A common resource for regional and national associations to draw from in addressing the human resource needs of Canadian libraries on a national level

III. CURRENT PARTNERS

The following associations have agreed to contribute financial support and other resources to this project:

- Canadian Heritage
- Canadian Library Association
 - Canadian Association of Public Libraries
 - Canadian Association of College and University Libraries
 - Canadian Association of Special Libraries and Information Services
 - Canadian School Library Association
 - Canadian Library Trustees' Association
- Association pour l'avancement des sciences et des techniques de la documentation
- Canadian Council of Archives
- Canadian Museums Association
- Library and Archives of Canada
- Council of Administrators of Large Urban Public Libraries
 - Members:*
 - Barrie Public Library, Ontario
 - Brampton Public Library, Ontario
 - Burlington Public Library, Ontario
 - Burnaby Public Library, BC
 - Calgary Public Library, Alberta
 - Cambridge Public Library, Ontario
 - Coquitlam Public Library, BC
 - Edmonton Public Library, Alberta
 - Halifax Regional Library, NS
 - Hamilton Public Library, Ontario
 - Kitchener Public Library, Ontario
 - Laval-Service de la culture, des loisirs et de la vie communautaire, Quebec
 - London Public Library, Ontario
 - Bibliothèque Municipale de Longueuil, Quebec
 - Markham Public Libraries, Ontario
 - Mississauga Library System, Ontario
 - Bibliothèque de Montréal, Quebec
 - Oakville Public Library, Ontario
 - Oshawa Public Library, Ontario
 - Ottawa Public Library, Ontario
 - Provincial Resource Library, Newfoundland
 - Regina Public Library, Saskatchewan
 - Richmond Hill Public Library, Ontario
 - Richmond Public Library, BC
 - Saskatoon Public Library, Saskatchewan
 - St. Catharines Public Library, Ontario
 - Surrey Public Library, BC
 - Thunder Bay Public Library, Ontario

- Toronto Public Library, Ontario
- Vancouver Public Library, BC
- Vaughan Public Libraries, Ontario
- Greater Victoria Public Library, BC
- Windsor Public Library, Ontario
- Winnipeg Public Library, Manitoba
- Canadian Association of Research Libraries / Association des bibliothèques de recherche du Canada
 - Members:*
 - University of Alberta
 - University of British Columbia
 - University of Calgary
 - Carleton University
 - CISTI-NRC
 - Concordia University
 - Dalhousie University
 - University of Guelph
 - Université Laval
 - University of Manitoba
 - McGill University
 - McMaster University
 - Memorial University of Newfoundland
 - Université de Montréal
 - National Library of Canada
 - University of New Brunswick
 - University of Ottawa
 - Université du Québec à Montréal
 - Queen's University
 - University of Regina
 - University of Saskatchewan
 - Université de Sherbrooke
 - Simon Fraser University
 - University of Toronto
 - University of Victoria
 - University of Waterloo
 - University of Western Ontario
 - University of Windsor
 - York University
 - Provincial and Territorial Library Directors' Council
 - Ontario Library Association
 - Saskatchewan Provincial Library
 - Association of New Brunswick Librarians
 - Library Association of Alberta
 - New Brunswick Public Library Service
 - Nova Scotia Provincial Library
 - British Columbia Library Association

- University of Alberta

IV. POTENTIAL PARTNERS

A national study undertaken to investigate such a depth of questions with regard to Canadian librarianship would be most effective with the support of a variety of sources. Partnerships undertaken with the following associations and levels of government will make major contributions to ensure the viability and verifiability of the research.

- Conférence des recteurs et des principaux des universités du Québec
- Canadian Association of Small University Libraries
- Canadian Health Library Association/Association des bibliothèques de la santé du Canada
- Canadian Association of Law Libraries/Association Canadienne des bibliothèques de Droit
- Association of Library and Information Science Education (Canadian institutions)
- Provincial Library Associations
- Provincial Ministries
- Human Resource Development Canada
- Social Science and Humanities Research Council
- Rural Secretariat
- Statistics Canada

IV. STEERING COMMITTEE

Ernie Ingles is presently Associate Vice-President (Learning Services) at the University of Alberta, and has been Chief Librarian and Director of Libraries since 1990. In this capacity, he has achieved recognition for his strategic planning initiatives, technology planning, the creation of the NEOS consortium, the development of the province-wide Health Knowledge Network, and other innovations. Mr. Ingles has held several executive positions on Boards, including the Presidency of the Canadian Library Association, the Bibliographic Society of Canada, the Council of Prairie and Pacific University Libraries, and the Saskatchewan Library Association; and has served on and chaired numerous others, such as OCLC Research Libraries Advisory Board, Canadian Association of College and University Libraries, the Canadian Association of Research Libraries, the Canadian Government Publishing Centre, the Book and Periodical Development Council, the National Library of Canada, the National Research Council of Canada, and the Canada Institute for Scientific and Technical Information. He has published frequently, and has made a key contribution to the Canadian library community through the founding of the Northern Exposure to Leadership Institute. He has been the recipient of numerous awards; in 2003 he received the Queen's Jubilee Medal in recognition of his outstanding contribution to libraries, and in 2001 he was elected as a Fellow of the Royal Society of Canada.

Dr. Marianne Sorensen has a Ph.D. in Sociology, majoring in labour market and education. She has written a number of reports on libraries and on labour market- and university-related topics, has developed research plans and questionnaires, developed a course on selection and recruitment, and is currently employed as an independent social science research consultant. Dr. Sorensen was the principal researcher for three survey projects carried out on behalf of the Edmonton Public Library system designed to examine public usage and evaluations of the system. She has also co-authored a distance-education course package on recruitment and selection, and worked with a collaborative initiative between Alberta Learning and the province's universities and university/colleges on student satisfaction and the labour market experiences of graduates.

Don Butcher is the Executive Director of the Canadian Library Association. He has worked in not-for-profit associations for the past 16 years, most recently three years as executive director of Ontario's real estate appraisers. Prior to that position, he was Manager of Membership and Professional Development for the Canadian Society of Association Executives, the professional association for managers in the not-for-profit sector. He has also been Manager, Marketing & Communications for the Ontario Physiotherapy Association which included responsibilities in membership recruitment and retention in addition to promoting the profession and communications with the membership. Don also worked at York University for over eight years, first in the Communications department and then in two management positions: in Alumni Affairs and as the first full-time Manager of Alumni Affairs in York's business school.

Kathleen DeLong has worked as the Associate Director, Finance and Human Resources at the University of Alberta since 1997. She holds an MLIS as well as a Master of Public

Management, and is a member of the American Library Association Ad Hoc Task Force on Recruitment and Retention Issues, as well as numerous university and library committees. Current responsibilities include the administration of human and financial resources on a system-wide basis at the University of Alberta Libraries.

Chuck Humphrey has served as the Data Library Coordinator for the University of Alberta Library since 1992. He was instrumental in organizing a federated membership in the Inter-University Consortium for Political and Social Research, and served from 1991 to 1995 as the President of the International Association for Social Science Information Services and Technology. He served from 1990 to 1996 on the Data Information Systems Panel of the Canadian Global Change Project. He is a founding member of the Canadian Association of Public Data Users and was a leading proponent of the successful Data Liberation Initiative (DLI). In 2000, he won the CARL/ABRC Award for Distinguished Service to Research Librarianship. He is currently a Working Group member of the National Data Archive Consultation and serves on the DLI External Advisory Committee for Statistics Canada.

Dr. Alvin M. Schrader, PhD in Library and Information Science, University of Indiana, is professor and former director of the School of Library and Information Studies at the University of Alberta. He led the School through two major reviews that continued the status of the MLIS at the U of A as an internationally accredited degree and recognized the School's high quality graduate program within the University. He oversaw the continuation of the School's faculty renewal. Dr. Schrader has been particularly active in the School's relations to the profession as councilor and then president of the Library Association of Alberta, member of the LAA Intellectual Freedom Committee, member of the Canadian Library Association's Executive Council, chair of the CLA's Intellectual Freedom Advisory Committee, and Canadian representative to IFLA/FAIFE, the Freedom of Access to Information and Freedom of Expression Committee of the International Federation of Library Associations and Institutions. He is a research specialist in issues of disciplinary identity for library and information studies, including educational contexts and influences. Dr. Schrader also has expertise in the area of evaluation, most recently as a consultant to the National Library of Canada's National Core Library Statistics Program resulting in publication of the 1996 and the 1999 survey reports.

Dr. Harvey Krahn (BA and MA, University of Western Ontario; PHD, University of Alberta) is a Professor of Sociology (Faculty of Arts) and an Adjunct Professor in the Department of Strategic Management and Organization (Faculty of Business) at the University of Alberta. He is currently serving as the Associate Dean (Research) in the Faculty of Arts. His research interests are in the sociology of work and organizations, the sociology of education, political sociology, and social stratification. Most recently, his research projects have focused on school-work transitions, labour market restructuring, educational reform, ideological shifts in Canadian society, and the experiences of refugees in the Canadian labour market. Dr. Krahn frequently acts as an advisor to federal and provincial government departments on labour market and education issues, particularly those involving youth.

William Curran is Director of Libraries, Concordia University. He holds a BA from Loyola College, a Master's of Library Science from McGill and a Master of Education from the University of Ottawa. Before he assumed his position at Concordia in 1998, he served at

McGill as the Visiting Librarian, as Faculty lecturer at their School of Library and Information Studies, in Branch Services and Public Relations, in Readers' Services, and as Head of the Howard Ross Management Library. He also held the position of University Librarian at Bishop's University, where he was involved with the extension to the library building and the implementation of the GEAC automated system. In 1994-95, he was president of L'Association pour l'avancement des sciences et des techniques de la documentation (ASTED). He represents the Canadian Association of Research Libraries/ Association des bibliothèques de recherche du Canada.

Julia Goodman is Development Officer, Council of Federal Libraries. In her capacity of Development Officer, Julia Goodman supports the work of the Council of Federal Libraries (CFL). CFL was established in 1976 by the National Librarian of Canada as a means of coordinating library services in departments, branches and agencies of the Government of Canada. The CFL leads the federal library community as it evolves and converges with other players in the information and knowledge field, in support of the Government's transformation to meet the needs of citizens in the knowledge age. CFL initiatives include the annual Agatha Bystram Award for Innovation in Information Management, a consortium for cost-effective subscriptions to electronic products, leadership in the area of metadata implementation, and continuous learning events of interest to information managers.

In previous positions, Julia worked on the development of a suite of desktop tools for the staff of Agriculture and Agri-Food Canada and the Canadian Food Inspection Agency, and on AgriWeb Canada, an online directory of Canadian Internet resources in agriculture. In her eleven years with the National Library of Canada at the beginning of her career, Julia worked in the planning function and as a cataloguer and a cataloguing section head.

Gerry Meek is the Director of Calgary Public Library, and the representative of the Council of Administrators of Large Urban Public Libraries. Prior to his appointment in Calgary in 1991, he was the Chief Executive Officer of the Thunder Bay Public Library. He has won numerous awards for innovative library service. Very active professionally, he has served as President of the Ontario Library Association, Council Member of the Executive Council of Canadian Library Association, Chair of the Council of Administrators of Large Urban Public Libraries, Chair of The Alberta Library, and Chair of the Alberta Public Library Directors Council, and is a frequent speaker at library conferences and workshops.

Allison Sivak received her MLIS in 2003, and is currently a librarian with the Academic Library Intern Program at the University of Alberta with a specialization in Data Librarianship. She has extensive experience in administration in the non-profit sector and possesses an undergraduate degree in Writing.

ADDITIONAL STEERING COMMITTEE MEMBERS, HERITAGE SECTOR STUDY

The above members (excluding Don Butcher) also sit on the Heritage Sector study, with the addition of the following representatives from the archives and museums communities, as well as from the Population Laboratory at the University of Alberta.

Bryan Corbett is University Archivist, University of Alberta Archives. Bryan received his Bachelor of Arts (Hons) and Master of Arts degrees in history at the University of Saskatchewan and Carleton Universities respectively. Bryan is a Certified Archivist (CA) and a Certified Systems Professional (CSP). In 1997 Bryan was appointed Coordinator of Freedom of Information and Protection of Privacy (FOIPP) as well as University Archivist at the University of Alberta. Bryan is a founding member of the Association of Canadian Archivists (ACA) and the Archives Society of Alberta (ASA). He was involved at various levels in the development of graduate and continuing education guidelines for archival studies programs in Canada and the United States. He continues to be involved in the American Library Association's Accreditation Program for Canadian and American Schools of Library, Information Sciences and Archival Studies. The Edmonton Chapter of ARMA International honoured him with its Distinguished Achievement Award (1992), its Chapter Member of the Year Award (1993) and its President's Award (1996).

Ed Krahn has been the Yukon's Museums Advisor since 1984, providing technical and funding support for Yukon museums and the umbrella organisation the Yukon Historical and Museums Association. He is also the Manager of the Museums Unit of the Cultural Services Branch of the Yukon Department of Tourism. Ed has also been working on the development of a support program for Yukon First Nations Cultural/Heritage Centres. He served for two years on the board of the CMA. In the past he has served as chair of a CMA Special Interest Group and when on the board of the CMA acted as board liaison with the SIG groups. Ed also served on the Canadian Heritage Information Network – Learning With Museum development team and currently sits on the Editorial Board of Canadian Heritage's Virtual Museum of Canada.

V. APPENDICES

Appendix A

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Editorial/Opinion

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Appendix B

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Culture Counts: Cultural Labour Force Survey Total Population (1991 SOC). Ottawa: Statistics Canada, 1995.

Includes statistics on librarians' employment status, numbers of jobs held by library professionals, level of interest in education and training, average incomes, level of education, and gender.

Canada's Culture, Heritage and Identity: A Statistical Perspective. 1997. Ottawa : Statistics Canada, 1997.

Includes statistics on numbers of librarians in the various library sectors.

Canadian Culture in Perspective: A Statistical Overview. Ottawa: Statistics Canada, 2000.

Includes information on government funding trends, salary trends, trends of librarians' career movements, average salaries and placements of graduates, national figures on FTE staff. Notes lack of comprehensive statistics for the library sector as compared to other cultural sectors.

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