



The Royal Society of Canada Expert Panel Report:

The Future Now

CANADA'S LIBRARIES, ARCHIVES, AND PUBLIC MEMORY

NOVEMBER 2014

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NOVEMBER 2014

A Report of the Royal Society of Canada's Expert Panel on the Status and Future of Canada's Libraries and Archives



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Preface

Libraries and archives are Canada's collective public memory. They represent a cherished repository of how, and why, we have become the Canada and Canadians we are today.

However, the world is changing. The digital revolution that has transformed so many industries and sectors in recent years, is also transforming libraries and archives. This raises many questions, including: *What is the status and role for Canada's libraries and archives in the 21st century? How should they embrace these new technologies and what should be done with their physical assets in this new, digital age? What expectations do the Canadians of today, including our rapidly growing aboriginal and immigrant populations, have for these repositories of knowledge and insight? And perhaps of most importance, what changes are needed in the resources, structures and competences in our libraries and archives to ensure that they continue to serve the 'public good' well into the future?*

These questions led the Royal Society of Canada to commission, in 2013, this Expert Panel report on the Status and Future of Libraries and Archives. The Expert Panel process is a key part of the mission of the Royal Society to "...advance knowledge, encourage integrated interdisciplinary understandings and address issues that are critical to Canadians". Royal Society Expert Panels provide independent, timely and authoritative insights and advice to Canadian governments, industry, non-governmental organizations, and citizens regarding subject areas that are in the public interest and that would benefit from a critical assessment of existing knowledge from a range of disciplinary and sectorial perspectives.

The Royal Society has commissioned many Expert panels over the past 20 years, but this is the first report to have its disciplinary 'roots' deep into Academy I (the Academy of the Arts and Humanities). Special appreciation goes

to Len Findlay, FRSC and Geoff Flynn, FRSC for their persistence in getting this initiative off the ground, and to the University of Alberta for providing some critical logistical and financial support when we needed it most.

We wish to thank the Panel Chair, Patricia Demers, FRSC, former President of the RSC, and her fellow panelists for volunteering their time and expertise to prepare this report. This represents a huge amount of work, but their passion for the topic can be seen in the report they have prepared.

We also want to thank the Peer Review Monitor and Peer Reviewers who provided extensive comments, criticisms and suggestions on the first draft of the report. The changes in the report generated by that feedback have greatly improved the quality and value of the document.

Finally, a special thank you to the members of the Royal Society's Committee on Expert Panels, the Oversight Committee that was set up to advise on the administration of this initiative, and the dedicated Royal Society staff that worked with this Expert Panel.

A handwritten signature in black ink that reads "Graham Bell". The signature is written in a cursive style with a large initial "G" and a long horizontal stroke at the end.

Graham Bell, PhD, FRSC
President, Royal Society of Canada

A handwritten signature in black ink that reads "David B Layzell". The signature is written in a cursive style with a large initial "D" and a long horizontal stroke at the end.

David B Layzell, PhD, FRSC
Chair, Committee on Expert Panels

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users at the Saint Boniface Public Library and with delegates at the meeting of the Manitoba Public Library Advisory Board. At l'Université de Montréal, the support and assistance of Recteur Guy Breton and Secrétaire administrative Martine Gemme provided a wonderful venue, making our consultation with students, academics, and members of the public an energized, enlightening event. Clive Maishment, CEO of The Alberta Library, and Stacey Bissell, Librarian with the Alberta Public Library Electronic Network, arranged for our series of meetings during the Netspeed Conference in Calgary. University of Alberta Chief Librarian Gerald Beasley co-hosted our consultation on campus, and Provincial Archives of Alberta Director Leslie Latta arranged for our consultation with archivists and clients. In Halifax University Librarian Donna Bourne-Tyson hosted a widely attended consultation at Dalhousie University with participants from across Atlantic Canada; with the assistance of panelist Judith Hare we also met with loyal users at the Dartmouth branch of the Halifax Public Libraries. Library Director and CEO of the Regina Public Library, Jeff Barber, made his boardroom available to us for a series of meetings with librarians, archivists, and readers from many areas in Saskatchewan. Thanks to the arrangements of University of Toronto archivist and ACA President Loryl MacDonald and the support of iSchool colleagues Wendy Duff and Dean Seamus Ross, we enjoyed a broadly representative consultation at OISE. Accepting the invitation of Ian Wilson, the Panel was pleased to participate in the Archives Summit. We returned to Toronto to consult at the OLA Superconference and the series of individual and public meetings arranged by OLA Executive Director Shelagh Paterson. In Québec panelist Carol Couture assembled a highly engaged group of professional colleagues for a consultation in the Salle du Roy, Musée de la civilisation. When the Panel met in Edmonton we were welcomed at the Edmonton Public Library by CEO Linda Cook, who arranged our guided visit to the Makerspace, at the Provincial Archives of Alberta by Leslie Latta, who gave us a full tour, and at the Bruce Peel Special Collections Library by Head Robert Desmarais and his colleagues, who accommodated our meeting with thoughtful hospitality. Gail Lint provided access to the holdings of the Alberta Foundation for the Arts. The research assistance of Jessica MacQueen and Brianna Erban has been invaluable, as has been the work of the Canadian Writing Research Collaboratory (CWRC) research team, Jeffrey Antoniuk, Susan Brown, Michael Brundin, Mihaela Ilovan, Hamman Samuel, and John Simpson, with whom they collaborated to prepare the visualization application in the Appendix. We also extend our profound thanks to the hundreds of Canadians who met with us and shared their stories and to those who expressed their views in submissions.

The questions and observations of anonymous peer reviewers and the extensive commentary of peer review monitor Graeme Wynn helped to strengthen our argument and foreground its importance. The creative work of designer Lara Minja has made our Report truly illuminating.

List of Acronyms and Abbreviations

AAFC	Agriculture and Agrifood Canada
AAO	Archives Association of Ontario
AAQ	Association des archivistes du Québec
ACA	Association of Canadian Archivists
ACE	Accessible Content E-Portal (Scholars Portal)
ACMLA	Association of Canadian Map Libraries
ACN	Archives Council Nunavummi
ADM	Assistant Deputy Ministers
AGC	Auditor General of Canada
AJL	Association of Jewish Libraries
ALA	American Library Association
AMA	Association for Manitoba Archives
ANLA	Association of Newfoundland & Labrador Archives
AODA	Accessibility for Ontarians with Disabilities Act
APLEN	Alberta Public Library Electronic Network
APLIC	Association of Parliamentary Libraries in Canada
ARMA	Association of Records Managers & Administrators
ASTED	Association pour l'avancement des sciences et des techniques de la documentation
BAnQ	Bibliothèque et Archives nationales du Québec
BCI	Bureau de coopération interuniversitaire
BCLA	British Columbia Library Association
BCLC	British Columbia Libraries Cooperative
BCP	Bibliothèques centrales de prêt
BNQ	Bibliothèque nationale du Québec
CAIPDC	Council on Access to Information for Print Disabled Canadians
CAIRN	CAUL Atlantic Islandora Repository Network
CALL	Canadian Association of Law Libraries
CARL	Canadian Association of Research Libraries
CAUL	Council of Atlantic University Libraries

CAUT	Canadian Association of University Teachers
CCA	Canadian Council of Archives
CEA	Canadian Education Association
Cégep	Collège d'enseignement général et professionnel
CELA	Centre for Equitable Library Access
CHA/SHC	Canadian Historical Association/ La Société historique du Canada
CHIN	Canadian Heritage Information Network
CIHM	Canadian Institute for Historical Microreproductions
CIO	Chief Information Officer
CLA	Canadian Library Association
CLAO	Church Library Association of Ontario
CLGA	Canadian Lesbian and Gay Archive
CMA	Canadian Museums Association
CMEC	Council of Ministers of Education Canada
CNIB	Canadian National Institute for the Blind
CNSLP	Canadian National Site Licensing Project
COA/ALA	Committee on Accreditation of the American Library Association
COPPUL	Council of Prairie and Pacific University Libraries
CORA	Canadian Opinion Research Archive
CPTA	Council of Provincial and Territorial Archivists
CRKN	Canadian Research Knowledge Network
CULC/CBUC	Canadian Urban Libraries Council
CWRC	Canadian Writing Research Collaboratory
DFO	Department of Fisheries and Oceans
DMP	Data Management Plan
DRAP	Deficit Reduction Action Plan
EBSI	École de bibliothéconomie et sciences de l'information, Université de Montréal
ELL	English Language Learning
EPL	Edmonton Public Library
FEEP	Fédération des Ecoles Secondaires Privées
FLA	Foothills Library Association
FOPL	Federation of Ontario Public Libraries
FSL	Federal Science Library

GELA	Greater Edmonton Library Association
GoC	Government of Canada
HLA	Halifax Library Association
HPL	Halifax Public Libraries
HRDC	Human Resources Development Canada
ICA	International Council on Archives
ICAP	Italian-Canadian Archives Project
IELA	Initiative for Equitable Library Access
IFLA	International Federation of Library Associations and Institutions
ILL	InterLibrary Loan
ILS	Integrated Library System
IM	Information Management
IRSRC	Indian Residential Schools Resolution Canada
IT	Information Technology
JISC	Joint Information Systems Committee
KM	Knowledge Management
LAA	Library Association of Alberta
LAC	Library and Archives Canada
LAM	Libraries, Archives, and Museums
LIS	Library and Information Studies
LS	Library Science
MELS	Ministère de l'Éducation, du Loisir et du Sport
MLCI	Manitoba Consortium Inc.
MLIS	Master of Library and Information Studies
MOOC	Massive Open Online Course
NADP	National Archival Development Program
NL	National Library
NLA	Nunavut Library Association
NLLA	Newfoundland & Labrador Library Association
NNELS	National Network of Equitable Library Service
NRC	National Research Council
NRC-CISTI	National Research Council-Canada Institute for Scientific and Technical Information
NRC-KM	National Research Council-Knowledge Management
NSL	National Science Library

NWTLA	Northwest Territories Library Association
OA	Open Access
OCLC	Online Computer Library Centre
OCLS	Ontario Colleges Library Services
OCUL	Ontario Council of Libraries
ODESI	Ontario Data Documentation, Extraction Service, and Infrastructure Initiative
OISE	Ontario Institute for Studies in Education
OER	Open Educational Resource
OLA	Ontario Library Association
OSLA	Ontario School Library Association
PAA	Provincial Archives of Alberta
PACL	Prairie Association of Christian Librarians
PKP	Public Knowledge Project
PLOS	Public Library of Science
PLR	Public Lending Right
PTPL	Provincial and Territorial Public Library Council
RCDR	Réseau canadien de documentation pour la recherche
RESDOC	Réseau des services documentaires collégiaux
RFID	Radio-frequency Identification
RSC	Royal Society of Canada
SODEC	Société de Développement des Entreprises Culturelles du Québec
SOLS	Southern Ontario Library Services
TAL	The Alberta Library
TDR	Trusted Digital Repository
TPL	Toronto Public Library
TBS	Treasury Board Secretariat
TUG	TriUniversity Group of Libraries
UAL	University of Alberta Libraries
VPL	Vancouver Public Library
WoSA	Whole of Society Approach
WPL	Winnipeg Public Library

Executive Summary

● PURPOSE

In Spring 2013 the Royal Society of Canada (RSC) struck this Expert Panel on the status and future of Canada's libraries and archive institutions. Our mandate acknowledged the allied obligation of libraries and archives. "They collect, preserve, and disseminate knowledge, and provide access to information and intellectual resources for civic engagement."

Recognizing that these institutions are "actively meeting the challenges of unfolding digital technologies, changing cultural practices, and society's expectations," RSC charged the Panel:

- To investigate what services Canadians, including Aboriginal Canadians and new Canadians, are receiving from libraries and archives;
- To explore what Canadian society expects of libraries and archives in the 21st century;
- To identify the necessary changes in resources, structures, and competencies to ensure libraries and archives serve the public good in the 21st century;
- To listen to and consult the multiple voices that contribute to community building and memory building;
- To demonstrate how deeply the knowledge universe has been and will continue to be revolutionized by digital technology; and
- To conceptualize the integration of the physical and the digital in library and archive spaces.

Our remit is large and inherently double-edged. The air of crisis acknowledged repeatedly by researchers concerned about vanishing and undervalued national, cultural resources coincides with a time of re-imagining and re-locating libraries and archive institutions as centres of community, human experience, and possibility. Conveying and responding to this duality fuel the urgency and spirit of our work: we heard both despair and excitement.

● METHODOLOGY

AS THE FIRST EXPERT PANEL of Academy I (Arts and Humanities) of the RSC, we shared a commitment to the variety of expressions of the culture of the mind and the rooted nature of memories. We agreed on the unassailable importance of their preservation. We also agreed that listening to Canadians from different backgrounds and in various locations was paramount. The public consultations we have held across the country – in Yellowknife, Vancouver, Ottawa, Winnipeg, Montréal, Calgary, Edmonton, Halifax, Regina, Toronto, and Québec – and the passionate defences of libraries and archive institutions we heard from hundreds of Canadians and received as over 125 online submissions have guided and structured our deliberations. We have reported on each consultation on our blog: <http://librariesarchivescanada.wordpress.com>.

We have collected all submissions in their entirety and in searchable form at this portal (<http://cwrc.ca/rsc-src/submissions/>).

We participated, moreover, in *The Canadian Archives Summit: Towards a New Blueprint for Canada's Recorded Memory*, held at the Munk School of Global Affairs at the University of Toronto. We joined in conversations with archivists, key partners, and students and directors of graduate programs in archival studies to discuss ways of growing and maintaining the record of Canada and advancing public recognition of our documentary heritage.

Why do we care about libraries and archives? In a networked knowledge society, with an increasingly diverse population, the expectations attached to these resources are complex and sometimes contradictory. In our panel discussions, we examined spoken and unspoken assumptions and looked at evolving technologies. In our public hearings, we heard what users and providers want from and offer to our knowledge institutions. This Report illustrates how these values play out in today's institutions and in the ones we might want tomorrow.

The Report combines an examination of critical literature and analyses of trends and specific challenges with remarks from participants at consultations and photographs of stunning new buildings in Canada.

The Report combines an examination of critical literature and analyses of trends and specific challenges with remarks from participants at consultations and photographs of stunning new buildings in Canada. Artists' prints and paintings also illuminate the new world of knowledge. Voices and visuals reinforce our findings. Again relying on the power of the visual and the flexibility of new media, we illustrate the national scope of the development and breadth of our libraries and archives through the digital mediascape of our specially created "Mapping and Timeline Application: A Visualization of Canada's Libraries and Archives." This appendix supplies a dynamic and expandable conceptualization of what is on offer in Canada.

● OUTCOMES

WE WANT TO SHARE THE EXCITEMENT we have felt in our conversations about libraries and archives; we want to emphasize Canadians' profound trust in and continuous reliance on these institutions and their services. We explore issues of inequitable access, organizational restructuring, leadership roles, and the need for continuous professional development among librarians and archivists. Yet throughout this exercise, we have been impressed by the resourcefulness, daring, and responsiveness of these institutions to accelerated public expectations.

Our title boldly asserts that the future must be acknowledged. We are not assuming the role of prophets, but rather of alert communicators. The library and archive sector needs institutional reform to improve efficiencies, foster more effective collaboration, and provide clearer, more reliable leadership. The Report synthesizes what we have heard and learned from Canadians. It conveys verbal and visual snapshots of transformative, energetic, forceful cultural institutions, either already flourishing or in planning stages. It also underlines the urgency of the present moment when disregard or neglect must be challenged and countered.

First and foremost, in the digital era, libraries and archives are as vital as ever to Canadian society, and they require additional resources to meet the wide variety of services they are expected to deliver. Equitable societies remove barriers between citizens and the material they need to enrich, inform, and improve their lives.

Second, while librarians and archivists must work more concertedly in nation-wide partnerships to continue to preserve our print heritage and to develop and maintain digital access, institutions and

different levels of government must invest in digital infrastructure to advance these projects.

Third, a national digitization program, in coordination with memory institutions across the country, must be planned and funded to bring Canada's cultural and scientific heritage into the digital era to ensure that we continue to understand the past and document the present as guides to future action.

Reflecting these important fundamentals we offer this selected digest of recommendations, which are expanded and justified in the pages that follow. While our expertise as panelists is diverse, we have all considered and endorse the recommendations.

THAT **LIBRARY AND ARCHIVES CANADA**

- develop and communicate a five-year strategic plan, including plans for periodic evaluation of progress, no later than Fall 2015;
- assume its place on national and international associations and councils;
- establish a task force of key members within library and archival communities to assist in addressing morale issues and harmonized cultures and to assess progress;
- facilitate the development of a national TDR collaboration including cloud storage;
- constitute a pan-Canadian committee of peers to establish standards for a network of regional preservation/storage facilities;
- re-establish its role as mediator working on behalf of print-disabled Canadians;
- start a joint project with CHIN to explore building tools for coordinated searching of existing databases;
- invest in the enterprise-level basics necessary to facilitate the whole-of-government, integrated library model piloted as the Federal Science Library;
- establish, with the support of the federal government, a Libraries and Archives Collaboration Fund, administered jointly by LAC, CARL, and CCA, to fund innovative collaborative projects.

THAT **THE CANADIAN COUNCIL OF ARCHIVES**

- coordinate, in association with ACA/AAQ, a national awareness campaign;
- review the accountability structures of the Canadian archival system to ensure compliance with national and international policy and the security of the national patrimony;
- in collaboration with the First Nations University, ACA, AAQ, and LAC, draft an introductory program of Indigenous Archival Studies to be offered in communities and reserves;
- expand its membership to include representation of major stakeholders in the public and private sectors engaged in the preservation of and access to Canada's documentary heritage;
- pursue communication with Indspire, in collaboration with the above partners, to establish a volunteer mentoring program involving archivists and Aboriginal youth.

THAT **THE CANADIAN LIBRARY ASSOCIATION**

- focus its activities on program accreditation, market research, a national awareness campaign, engagement in public policy, and international representation;
- strengthen its collaboration with literacy councils;
- reconceive itself as a federation;
- develop ebook cooperatives, in alliance with LAC and ministries of provincial and territorial governments.

THAT **CANADIAN URBAN LIBRARIES COUNCIL** and **CANADIAN ASSOCIATION OF RESEARCH LIBRARIES**

- work more closely with publishers and vendors to provide Canadians access to needed content, electronic databases, and unified collections;
- make full use of their users' rights to fair dealing;
- prioritize greater institutional cooperation on licensing and hosting to equalize access to resources by cloud services;
- participate in the growth of open educational resources.

THAT **PROVINCIAL AND TERRITORIAL MINISTRIES**

- gather in their regions to coordinate resourcing of collaborative activity;
- enact a policy on information management and record-keeping roles;
- review and update the legislation and regulation of archives;
- review founding principles to ensure that necessary resources are available to archives for their continued participation in and reporting to ARCHIVESCANADA.ca;
- collect and advertise best practices of inter-institutional and inter-professional collaboration;
- develop programs of financial aid to allow communities to take charge of the preservation, treatment, and availability of their archives;
- support the public library systems in forming larger units with adequate technological services;
- develop provincial/territorial standards to direct the development of a school-house public library model.

THAT **PROVOSTS OF U15 CANADIAN RESEARCH UNIVERSITIES**

- work collaboratively in developing shared print collections through sustainable resourcing for three to five regional preservation/storage facilities
- those hosting library or ischools, embark on a system-wide review of programs in partnership with professionals in practice and employers.

THAT **FACULTIES OF EDUCATION** and **FACULTIES OF LIBRARY, ARCHIVAL AND INFORMATION SCIENCE**

- include a course in community development;
- increase the number of graduates with competencies to manage the new school library/learning commons.

THAT **THE COUNCIL OF MINISTERS OF EDUCATION CANADA**

- commission a pan-Canadian panel to determine the most appropriate model for school libraries/learning commons
- provide sustainable funding for such developments.

Our hope is that this Report provides an informed national and international perspective on where our primary cultural institutions are and where they might be.

1 Values



Preamble

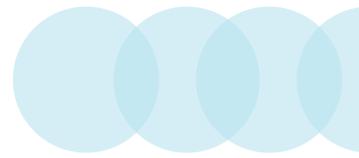
What's happened in the past can't stay in the past
for the same reason the future is always just a breath
away. . . . The past and the future are present.

— Joseph Boyden, *The Orenda* (2013)

The Panel's international membership reveals a wide breadth of professional experience: archivists and professors of archival studies; librarians in academic, public, and science libraries; a historian and literature professor whose research is illuminated by libraries and archives; a legal theorist; a museum curator; and a consultant. An independent, non-commissioned Panel, we undertook together to investigate the services Canadians, including underserved Canadians, receive from libraries and archives, to explore what Canadian society expects of these institutions in the 21st century, to identify necessary changes to ensure that they continue to serve the Canadian public good, to consult widely, to demonstrate the transformations in the knowledge universe revolutionized by digital technology, and to probe the realities of physical and digital spaces in libraries and archives.

The condition and future of both knowledge institutions are the subject of this Report, but we are not attempting to homologize them or to diminish in any way their defining yet complementary disciplines. Our Report strives to be comprehensive and holistic in its approach, emphasizing many of the innovations, realized opportunities, and challenges shared by libraries and archives. A word about terminology will be helpful here. We recognize both libraries and archives as institutions of salient importance. We acknowledge that a single word in French, "bibliothèques," corresponds to "libraries" and that "archives" is most readily translated as "documents d'archives." We recognize that the most appropriate





translation for “les institutions d’archives” is “archive institutions.” However, reflecting current linguistic practice in archival organizations themselves, we will refer to archive institutions as archives.

In addition, we have undertaken this exploration at a time when inquiry and theorization about these institutions as physical and imaginative sites is happening all over the world. The fact that our work coincided with related studies and new ventures buoyed and encouraged us. Among these projects are the American Library Association’s (ALA) *The State of America’s Libraries 2013*, the Dutch study *The Library of the Future: Hub for Knowledge, Contact and Culture* (2014), and the November 2013 presentation at the University of Toronto by Caroline Kimbell, Head of Licensing at the National Archives in the UK, promoting archives as curator, enabler, and tutor. In Fall 2013 the Public Policy Forum released its report, *Preserving Canada’s Memory*, based on selected, invited consultations in four cities. Panels such as the independent report on public library service in England commissioned in February 2014 and the government-commissioned panel of the *Council of Canadian Academies* studying Canada’s memory institutions dovetail with our own independent investigation.

Recent scholarly work has focused our attention on the evolving disciplines of archival studies and librarianship. In *L’Archivistique à l’ère du numérique*, Carol Couture and Marcel Lajeunesse concentrate on fundamental, sustaining elements of the discipline. Increased attention among historians, literary critics, and anthropologists has elevated archives, in Ann Laura Stoler’s view, “to a new analytic status with distinct billing, worthy of scrutiny on their own” (44). Focusing her research on the production and transformation of human experience through technology, Jaimie Baron, in *The Archive Effect*, calls for “a reformulation of ‘the

The inspiring spectacle of the contemporary architecture of libraries and archive centres lets us all participate in these reflections of our society and our time.

archival document' as an *experience of reception* rather than an indication of official sanction or storage location" (7). The experience of reading and the enabling role of librarians are continuously engaging topics. Andrew Piper's discussion of "reading in electronic times," *Book Was There*, reminds us that the book, as "the aggregation of communication, is the condition of more complex thought" (156); he cautions that in the search for "the single gadget that can perform all of our computational tasks, we should be sure not to let the computer become the new book" (157). In often polemical language R. David Lankes sketches his *Atlas of New Librarianship* as a social compact that is "ultimately the most important conversation librarians can have with the community and not just when budgets are on the line" (28). The results of such conversations are reflected in the planning and erection of iconic buildings in Aarhus, Oslo, Birmingham, and Helsinki, which parallel plans and sites in Canada – in Halifax, Regina, Winnipeg, and Calgary.

The inspiring spectacle of the contemporary architecture of libraries and archive centres lets us all participate in these reflections of our society and our time. Architect Jacques Plante brilliantly captures the excitement and beauty of such cultural institutions in *Architectures de la connaissance au Québec* (2013). Lise Bissonnette's Préface reminds us of the openness and freedom to discover that is the hallmark of these spatially transformed third spaces, community hubs, places for creation, reflection, and thoughtful refuge. "No other route in the city, or in the village, or in the school, or in the university offers a space as free from constraints, as free of access." (vii).

This Report is, in every sense of the word, a composite project, blending our observations and analyses and our conversations with Canadians. In this chapter, we explore the values Canadians cherish and the ways libraries and archives have realized and continue to enhance these values in everyday life. In the second chapter we intersperse our examination of the complex ecosystem of professional institutions and organizations and their mandates with stories of Canadians, both fictional and autobiographical, who are all in search of knowledge and understanding. The complexity of this system is not well known, either to funding authorities or to Canadians in general. Funding parsimony has led to some creative adjustments; however, even a marginal incremental investment would amplify many times the benefits provided to our society. Canadians' stories address the need for equitable and diverse access and extended outreach, the conditions for student success, the accommodation of different media and venues for career progress, the experience of frustration, and the countervailing realities of civic welcome and the sustaining presence of community. In the third chapter we offer recommendations reflecting the arguments about each topic.

● A DIGEST OF VALUES

If you do not value libraries then you do not value information or culture or wisdom. You are silencing the voices of the past and you are damaging the future.

— **Neil Gaiman**, “Why our Future Depends on Libraries, Reading and Daydreaming” (2013)

Something has economic value if its benefits to the well-being of society (including future generations) are greater than or outweigh its costs. The full schema of economic value incorporates commercial (or market) value; use values not captured within markets; and non-use values.

— **John Holden**, *Capturing Cultural Value* (2004)

Archivists everywhere stand for accountability, transparency, and responsiveness of organizations through responsible record keeping from the moment records are conceived and so long as they exist. That archivists often labour with little external understanding of their highest aims, with slim means, and in the face, sometimes, of countervailing pressures to act irresponsibly is but part of their paradoxical and noble obligation in a democratic society.

— **Terry Eastwood**, “Archives, Democratic Accountability, and Truth” (2010)

There are “different perspectives on what constitutes ‘value,’ how it should be measured and what data should be captured” (Scott 9). Value may be instrumental or intrinsic. Whether archivists and librarians see value as an overarching principle of worth, significance, or usefulness rooted in realities or as an enduring belief that motivates conduct, they unite in affirming that “the end-state that value wishes to achieve is that the people of the future will be able to know what we know” (Gorman 7). As charters, universal declarations, manifestos of core values, and shared values wheels demonstrate, archivists and librarians are dedicated to initiating, preserving, managing, and sharing the records of our human, economic, and symbolic capital.

Contingent and perspectival values distinguish librarians and archivists from one another. Archives constitute a fundamental element of our heritage, a

Archivists and librarians are dedicated to initiating, preserving, managing, and sharing the records of our human, economic, and symbolic capital.

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Canadians.

privileged, irreplaceable witness, which archivists evaluate and maintain as our collective memory. Archival documents are first and foremost evidence, and archival principles derive from the necessity to maintain their meaning and value in the context of their creation. Archivists, therefore, have to be involved at the first instance of creation of the record to ensure its survival throughout the continuum. Creating and maintaining records are not discretionary or merely desirable; they are a legal requirement for all public bodies and for most private organizations and individuals. Although the differences between libraries (where books and other types of published materials with pre-organized information are discrete entities) and archives (where unique material is preserved in the context of its creation and where access may be mediated) are marked, and variations in descriptive standards and metadata practices further demarcate the two institutions, they nonetheless share certain principles: diversity, access to physical and virtual services and spaces, and a vigorous commitment to engaging and informing all citizens.

As ways of funding these institutions shift, so the concept of public value evolves. The second chapter of *The Library of the Future: Hub of Knowledge Contact and Culture*, released in The Hague in 2014, addresses the subject “Where are we coming from: social purpose and public values.” In her collection *Museums and Public Value*, Carol A. Scott envisages a “new accord” in which governments and public institutions are equally dedicated to public value outcomes and work “in a spirit of collaboration and consensus, combining approval processes, funding and organizational assets to create value in the public sphere” (3-4). The diversity and needs of this public sphere within a specific Canadian context were the topics of the Panel’s wide-ranging, comparative discussions.

Collective Civic Responsibility

THE DUTY TO COLLECT, PRESERVE, AND CATALOGUE the printed and digital materials of our national heritage is a vital responsibility. Historian Charlotte Gray has observed:

In our literate and sophisticated country that has changed so dramatically over time, we are in constant danger of losing sight of the people, ideas and values that have shaped our society. Such a loss would mean we would become a country with amnesia – if not Alzheimer’s. Libraries and archives strengthen the connective tissues of our society by reminding us of what has made us Canadians.

With a different physiological metaphor, archivist Carol Couture draws attention to another form of collapse, broken vertebrae. Viewing archival science within the framework of contemporary Information Technology, he describes its principles of appraisal, selection, acquisition, preservation, and availability as the backbone, “colonne vertébrale.” But he also attends to the fragility and impermanence of the digital, and particularly born-digital information, underscoring the absolute necessity of the archivist’s involvement at the moment of creation, and even before the creation, of born-digital records:

Finally, in contemporary archival science, in Canada as elsewhere, the importance of intervention at the outset is indisputable. The creation of archives by the great means supplied by Information Technology allows us to see and do more each day. The archivist can no longer intervene late in the life cycle of archival documents, as was possible with analogue means. In the domain of born digital archives, the authors agree to recognize the essential character of intervention at the outset. If the archivist is not present at the very moment of the creation of information to record archival decisions in the metadata, among other things, he will never be there. Never will he succeed to recapture this uniquely volatile reality.

Recent issues around email systems in the Office of the Ontario Premier and the Prime Minister’s Office have highlighted the growing need for effective rules and enforcement of compliance for both the creation and the proper maintenance of records. The report of the British Columbia Privacy Commissioner, released in July 2014 (<https://www.oipc.bc.ca/special-reports/1664>), sounds an alarm about the failure to archive ten years of valuable government records and strongly recommends modern records management legislation.

The new forms of interactive Web applications and the prospects of participatory archiving suggest to Eric Ketelaar, former Archivist of the Netherlands, that the archives, “a place of shared custody and trust where records are preserved through time, long enough perhaps to destroy the agony and heal the community,” are relying with greater frequency on virtual or digital space.

Both inscription and space will increasingly be ‘located in the cloud’ and maintained (in distributed custody) by individuals, groups, and memory institutions. Together they are actors in an ecology which comprises archives/records and other memory texts in a societal context.

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“A passion for public service lies at the heart of a library.”

The collective impact of that societal context and the power of the archives to control agony and rebuild a community were brought home to us forcefully at several points during our consultations. At the Prince of Wales Northern Heritage Centre in Yellowknife, Territorial Archivist Ian Moir related that “since 2004 the NWT Archives has worked collaboratively with IRSRC (Indian Residential Schools Resolution Canada) to assist claimants with approximately 2000 claims.” At the consultation in Toronto, University of Toronto Archivist Loryl MacDonald reminded us of archives’ role in solving social justice issues, from settling the case of the wrongly convicted Stephen Truscott to addressing Arctic boundary disputes. We recalled as well the contribution of libraries at the time of the Walkerton Report (2002) that was born digital and lost digital, but had been printed by a number of librarians. Medical and legal libraries were key resources during the tainted blood scandal of the 1980s and subsequent issuing of the Krever Report (1997).

These interventions prompt a series of fundamental questions about the purpose of libraries and archives. Public value resets the compass in the direction of citizens – readers, inquirers, new immigrants, unemployed searchers – whom the institutions exist to serve. Archival documents are, in the first instance, evidence, and archival principles derive from the necessity to maintain their meaning and value in the context of their creation. Lawyers, judges, and researchers are informed users of archival services in preparing testimony about a wide range of historical issues, among them, land claims, environmental change, and residential schools. For librarian Judith Hare, “a passion for public service lies at the heart of a library.” Although “traditional values and professional ethics remain largely unchanged,” she argues that “societal changes and new realities point to the need to articulate and promote a new understanding of the library’s role and its place in the cultural fabric of Canada.” In reviewing the credos of values of national and international libraries and archives, Pam Bjornson is especially impressed by “the inclusion of innovation as a value.” Among the transforming influences of public libraries, Ken Roberts cites the movement toward Users Taking Control, as invoked by the Manager of the Main Library in Aarhus, Knud Schulz, in his March 2014 presentation (“Sketching the Future Library Transitioning to a Space for Citizens and Community Connections”) sponsored by the Harvard University Library and the Graduate School of Design. Under this rubric Roberts cites examples involving genuine interaction between the institution and its users:

DOK, in the Netherlands, developed software that allows library users to add images and stories to the library’s digital local history collection. The

Library 10 in Helsinki permits users to program concert space any night of the week, without consulting staff except to ensure that the space is available. In Denmark, more than 50 public library buildings allow users to enter the space, including checking out physical material, even when the branch is closed; precautionary checks include the library card as part of a common identification card. Discovery Layer software allows users to comment on library material they liked and didn't like.

Such energetic attention to the citizen-user marks a tectonic shift in libraries and particularly in community archives. Ernie Ingles reminds us of the vast social scope of the influence of libraries visible on a daily, even hourly, basis in these snapshots:

A mother reading to her child for the first time after having attended a public library's literacy program; a child simply learning the wonder of words in a story time session; a teenager unraveling the mysteries of adulthood in the YA reading programs; the college or university student realizing that she will not graduate without the library; professionals seeking to update their skills and credentials; a young couple improving their lives together; a new Canadian in search of language skills; and a senior whose outstretched leathery hand simply says 'thank you' for a lifetime of enlightenment and enjoyment.

Canadians visit libraries almost as much as we go to the movies and twenty times more often than we attend Canadian NHL games each year. About as many Canadians have library cards as have passports. Every month, 204,000 Canadians get job-seeking help at their public library.

Implementing Public Value

VARIOUS LIBRARY ORGANIZATIONS AND THE TORONTO PUBLIC LIBRARY (TPL) have addressed public value directly. The *Canadian Urban Libraries Council* (CULC), the *Canadian Library Association* (CLA), the *Federation of Ontario Public Libraries* (FOPL), and the *Online Computer Library Centre* (OCLC) have amassed compelling data about the value proposition. We learn that Canadians visit libraries almost as much as we go to the movies and twenty times more often than we attend Canadian NHL games each year. About as many Canadians have library cards as have passports. Every month, 204,000 Canadians get job-seeking help at their public library. Noting that the list is not exhaustive, FOPL catalogues these strong values: measurable return on investment; support to small business and entrepreneurs; welcome to new Canadians; development of early literacy; help with formal education and homework; equitable access for all including those with visual or physical limitations; accessibility to government services; and affordable leisure.

In 2009, a Léger Marketing survey was commissioned by the Table de concertation des bibliothèques du Québec on the perception and satisfaction of Quebecers toward their libraries. Among other highlights, we learn that 43% of the Québec population are subscribing to or visiting libraries. The respondents maintain that libraries offer pleasant environments (8.0/10) but they are less enthusiastic about their adaptation to the digital world (7.1/10) (Table de concertation des bibliothèques québécoises 11-12). The economic impact study *So Much More* (2013), prepared by the Martin Prosperity Institute of the University of Toronto for TPL, is in its own words “the first Canadian public library study to measure in concrete economic terms the Return on Investment for library service” (1). Its findings itemize in detail direct and indirect tangible benefits as well as intangible benefits of the 98 branches of TPL. The study declares: “For every dollar invested in the TPL, Torontonians receive \$5.63. This benefit results from the market value of services delivered, or direct tangible benefits and the stimulus to Toronto’s economy for direct spending and re-spending” (1).

Measuring value often relies on standard econometric criteria favouring quantitative data at the expense of qualitative information. But, indeed, there is so much more. It is imperative that librarians and archivists be actively engaged in devising and promoting their own instrumental and intrinsic measures. Reflection, analysis, and organizational change are constant within these enterprises. The term “building capability” can be a coded way of simply ignoring non-market values. The concept of public value goes beyond mere inputs and outputs. It highlights the process of value creation, paying particular attention to the social and cultural values that contribute to “social cohesion, social relationships, social meaning and cultural identity, individual and community wellbeing” (Benington 45).

Through leadership in national and international organizations, librarians and archivists are describing the actual impacts of their work, so notoriously difficult to measure. They are concentrating on a full, inclusive concept of a public rather than isolated or special consumers. They are participating in a dialogue so that “value is being added to the public sphere . . . through closer linking of users and producers in creative joint development of products and services tailor-made to meet unmet human need—co-creation of public value” (Benington 45).

To begin with the professionals themselves, librarians and archivists are their own champions. For Guylaine Beaudry the librarian serves the public interest through dedication to principles and action:



Janet Mitchell
**We're All Together
in This!**, 1992
oil on canvas
61 x 76 cm
Collection of the Alberta
Foundation for the Arts

To be a librarian is to express a loyalty to a nation, to a collectivity, to an institution, to a mission, to a cause.

To be a librarian is to express a loyalty to a nation, to a collectivity, to an institution, to a mission, to a cause. According to the situations where he is called to practice, the librarian commits himself to promote and advance education, to banish illiteracy, to contribute to vaulting over or at least diminishing the barriers to scholarship and learning, to disseminate and enliven culture, our own and all the others, to contribute to the redress of inequalities. He makes everything work to guarantee and facilitate access to information and culture and to underscore respect for freedom of expression and opinion. (67)

Ken Roberts perceives libraries and archives providing “Canadian society, community by community, with places – both virtual and physical – that encourage people to be inventive, thoughtful, and able to make informed decisions.” He envisions this concept, for libraries, in an enlarged space.

There is a growing realization that physical libraries are becoming even more important community spaces, places where people gather, share, and learn from each other. Print collections will occupy less physical

Physical libraries are becoming even more important community spaces, places where people gather, share, and learn from each other.

space but, if anything, libraries will find that competing demands for quiet space and for noisy public space, for collaboration and for discovery spaces mean that library buildings will become larger and more flexible.

Couture presents the archivist as a crucial player in Canadian society, supplying the means to discover and rediscover the richness and pertinence of our heritage.

By the principles he applies, the functions that direct his actions, the practices that enrich his daily life, the competencies acquired in his education, and the specialized resources on which he can count, the archivist is undeniably an asset for Canadian society. He is one of its key components and participates without a shadow of a doubt in its development by organizing appropriately information contained in records (current and semi-current) and by disseminating, showcasing, and making accessible the historical archives that comprise an essential element of the heritage so dear to a society that discovers and re-discovers their richness and pertinence every day.

Clearly the public value framework integrates the direction of libraries and archives with the needs of all citizens and the requirements of good governance.

Transforming Lives

THE MOST MOVING FEATURES OF OUR CONSULTATIONS have been the stories about lives changed forever through access to archives and libraries and the support of their professional staff. So riveting are these accounts that we offer a sampling of them here.

Alison Hopkins, Territorial Librarian of NWT, reports on the establishment of public libraries over the past five years in thirteen communities, “all of which had no history of public library services. In many communities the library will continue to be the only place where written material is available. A reported 31% of all library visitors use computers.” Her comments on library programs in the NWT combine aspects of civic duty and public value:

From January to March 2013, 20 public libraries offered 1000 programs attended by 14,000 people. These programs include a sewing circle, family computer night, a cupcake challenge, drumming and hand

In many communities the library will continue to be the only place where written material is available.

games, robotics club, and a Pokémon club. After-school programs are especially popular in small communities with few other options.

With a population of approximately 43,000 spread over one million square kilometres and with eleven official languages, the Territorial government has created Aboriginal language apps and supplied libraries with iPads. Computer resources are used for school projects, resumé writing, reading newspapers, and communicating with friends in other communities.

The Head of the University of Manitoba Archives & Special Collections, Shelley Sweeney, has drawn our attention to two particularly rich and illuminating archives: the Walter Rudnicki fonds of records relating to the forced relocation of indigenous communities (among other topics) and the Hamilton Family fonds containing the records of séances investigating life after death in Winnipeg from 1920 to 1945. Playwright Carolyn Gray won a Manitoba Day Award, presented annually for archival excellence by the *Association for Manitoba Archives* (AMA), for her play *The Elmwood Visitation* (2007), based on her use of the Thomas Glendenning Hamilton fonds – so popular with Hollywood and Canadian filmmakers; these fonds supplied material for Guy Maddin's *My Winnipeg* (2008) and the horror blockbuster *The Haunting in Connecticut* (2009). Sweeney argues for the cultural enrichment of the communal ownership of such records. “Whether you are an individual searching for documentation to prove you attended Indian Residential School, for example, or you are someone who wants to write the history of your gardening group in Winnipeg, archival records are critically important to the realization of your goals.” She mentions two specific instances of the therapeutic memory housed in archives. The University of Manitoba’s collection of photographs and architectural drawings of the water tower formerly on the campus proved to be very important to a patient at the St. Amant Centre for Developmental Disabilities, who had spent years staring at the tower from his room and was saddened when it was demolished. “He carefully worked out a monthly payment schedule that would allow him to buy poster-sized images for his new apartment when he moved.” She also relates that “an elderly woman was reduced to tears” when the archival staff provided her with the photo of her grandson with Prime Minister Trudeau from the *Winnipeg Tribune* as well as photos from an entire strip of undeveloped negatives. Her grandson had recently died from suicide “and she wanted to be reminded of a happier time.”

Patricia Cook, the first-place winner of the BC Public Libraries province-wide library essay contest, relates how libraries literally changed her life. Cook’s “A Library

“Whether you are an individual searching for documentation to prove you attended Indian Residential School, for example, or you are someone who wants to write the history of your gardening group in Winnipeg, archival records are critically important to the realization of your goals.”

in Motion” appears in the collection of prize winners, *Beyond Words*. Because of a childhood of continuous re-location, she found refuge in a series of libraries even though she hid the fact that she could not read:

I also have to admit that I never read even one book, not one book, in any of the libraries I adopted in each new place we lived. I just listened to the librarians and a lot of parents read the most fantastic stories to their children. I did try to learn to read and I really wanted to learn but I couldn't get anything to stick in my head. I found out later in adulthood that when a child lives in chaos and fear, learning is next to impossible because you are only trying to survive. . . . But not knowing this as a child, I felt I was to blame and that my brain was broken and this affected my life in every direction. I felt that the library was my safe zone-friendly, supervised territory.

The crisis when she was fourteen and “failing every subject” resulted in her running away from school and home to the library:

I'm a little embarrassed to admit this, but I was actually hiding under one of the back tables. Yes, I know, I was 14 years old, but I felt 5. Instead of questions or asking me to get out from under the table, the librarian found a book and began to read it aloud. I think that today she read herself into my heart because the next thing I knew I was laying my problems down. I told her everything the teachers said, what the doctors said, I told her everything. The librarian told me very seriously that everyone was wrong. If I could learn a little, I could learn more and that she would help me. That is exactly what my librarian went on to do. I received my very first certificate of reading achievement that summer, awarded to me by Ellen Wise, my librarian, which I still have today.

Canadians from all walks and stages of life have expressed their indebtedness to libraries.

Patricia Cook emerged to become “a great student with an A+ in English every time” and a problem-solving mother of three who uses library books to upgrade her computer, repair her van, and, of course, read to her children.

Canadians from all walks and stages of life have expressed their indebtedness to libraries. Among the testimonials in the CLA's *National Values Profile* (2012) are these comments from well-known beneficiaries.

The value of the public library system to children is inestimable and in my own life, I could not be the person I am, or have the career I've had, if it weren't for the opening of my mind and the generous access to books which the Ottawa Public Library gave me.

— **Adrienne Clarkson**,
former Governor General of Canada

I grew up at the library. I used to spend many Saturday afternoons signing out books and I was such a voracious reader that the librarians allowed me to sign out more books than were normally allowed.

— **Naheed Nenshi**, Mayor, City of Calgary

One patron's testimonial is worth a thousand gate counts when it comes to making the case for libraries. Librarianship isn't about gate counts and circulation figures, but people helped, lives enriched, and communities improved.

— **Sandra Singh**, Chief Librarian,
Vancouver Public Library

Our public library is a meeting place for people and ideas, a hub for strengthening individuals and communities. It is an institution that does not judge, and seeks to meet our citizens where they are, standing ready to facilitate their learning and development, and nurture their sense of creativity and discovery. It's one of the most important institutions of our City.

— **Don Iveson**, Mayor, City of Edmonton

There are two priceless features of each of the 18 million annual library visits [2011] in Toronto. First, sharing wisdom through the library and its programs increases the wealth of our community. Second, the library is completely democratic. It provides access to information, culture and leisure for new immigrants and established Canadians, to children and the elderly, and to all Torontonians whether they're rich or going through tough times.

— **Vincent Lam**, author and ER physician



CHEVALIER MORALES, ARCHITECTS AND VILLE DE MONTRÉAL, ARRONDISSEMENT PIERREFONDS-ROXBORO

Bibliothèque de
Pierrefonds, Escalier

My childhood in Trois-Rivières was marked by the book and publishing. The children’s library on Hart Street was on the way to my school. I used to stop every day. I filled up for myself and for some boarders who were great readers. The two librarians whom I recall particularly, Misses Godbout and Johnson, at times consoled me by suggesting reading. . . The librarians introduced me to the world, intellectually speaking. (Vaugeois 20, 57)

— **Denis Vaugeois**, politician and publisher

The famous “knowledge society” has belonged until now to those who built it and possessed the keys. The time has come to open it to everyone, in a real world. Libraries and archives, among the oldest inventions of communal life, become the most appropriate venues in this new time. (BAC & BAnQ 25)

— **Lise Bissonnette**, Présidente et Directrice Générale,
BAnQ, 1998–2008

The Fact that They Exist

OUR CONSULTATIONS ALSO REVEALED widespread anxiety about the permanence and sustainability of Canada's libraries and archives, institutions so irreplaceable and central yet so vulnerable. Closures of science libraries, loss of professional personnel, diminution of funding and services at Library and Archives Canada (LAC), and a great question mark surrounding the future of this merged institution, all exacerbate the sense of unease. The establishment of such national institutions as LAC signalled Canada's cultural emergence and maturity. Their diminished or precarious stature is a source of great concern.

We must go back to the eighteenth century to find the roots of our knowledge institutions. That is when an Enlightenment belief in human progress and pioneering impulses for the promotion of useful knowledge led to the establishment of both garrison and lending libraries in British North America. In the nineteenth century these were followed by Mechanics' Institutes for the advancement of skilled workers, and a variety of reading circles and literary societies. The lending libraries primarily catered for the upper classes and clergymen; their membership fees were beyond the means of most labourers. Some garrison libraries encouraged women to subscribe; by 1835, the garrison library in Halifax, "open to the public," had "thirty women on the membership rolls" (Vance 113). The reforms of the Reverend Egerton Ryerson, Superintendent for Schools in Canada West from 1846 to 1876, underpinned the Library Act of 1850, enabling the creation of township libraries. In the progression that colonial elites sought, "from the natural curiosity of the child to the well regulated taste of the adult," the library in its many and diverse manifestations was singularly important "as an antidote to the saloon" (Vance 115, 116).

The trajectory of library development in Québec shows similar traits of surveillance and control before the spectacular blossoming of institutions and services today. In 1924, the Bureau de la statistique du Québec reported 24 libraries in the province, each linked to a city or to an association. Until the late 1940s, the public reading infrastructure for francophones was limited to 225 parish libraries that had poor collections and counted on volunteers who applied moral censure (Lajeunesse, "Les bibliothèques paroissiales" 146). The Royal Commission of Inquiry on Constitutional Problems (Tremblay Commission 1953-1956) noted that only 13 cities of the 46 of more than 10,000 citizens benefited from the services of a public library. At that time in Québec, 35% of the urban and 5% of the rural population had access to a library. In 1959, under Paul Sauvé, the first law for

the development of public libraries was adopted. This period also saw the creation of networks of rural libraries (Bibliothèques centrales de prêt [BCP]) in most regions. In 1981, another law was voted under René Lévesque regulating books and an ambitious plan for developing public libraries. The “Plan Vaugeois,” named after Denis Vaugeois, then Minister of Culture, supported municipalities that offered free access and hired professional librarians for their library (Lajeunesse, “Les bibliothèques publiques,” 459-462).

Archives actually predate many libraries in Canada. In 1872 the first cultural initiative of the newly formed Government was the appointment of the Dominion Archivist, Douglas Brymner, along with the establishment of an Archives Branch in the Department of Agriculture. His successor Arthur Doughty (later Sir Arthur) had an immensely influential career:

He continued the program to copy Canadian records in Paris and London, and had extraordinary success in acquiring the original papers of former colonial officials. ... He began the national documentary arts and portrait collections. ... Through active programs of publication, teaching, and exhibitions, the Public Archives of Canada became an active cultural presence, encouraging the universities to study and teach Canadian history. (Wilson 727)

The Symons Report, *To Know Ourselves* (1976), has emphasized the importance of archives as “the foundation of Canadian Studies.”

Without them research on the development of our society, institutions, and culture would be impossible. Self-knowledge depends on a fearless examination of our individual and collective pasts. (169)

The development of a national library has been a more prolonged process. The “nation-wide study,” *Libraries in Canada: A Study of Library Conditions and Needs* (1933), concluded “after some 18 months of study that ‘though you can find books, there is no real library service, and nearly 80% of the people of Canada have nothing that could, by any stretch of the imagination, be called library service of any kind’” (Wilson 728). Significantly the Royal Society of Canada was, along with other scholarly organizations, a prime mover urging the creation of a National Library, which its brief in 1946 characterized as a much-needed “coping-stone” (1). In addition, the Dominion Archivist, W. Kaye Lamb, argued before the Royal Commission on National Development in the Arts, Letters and Sciences (1949-51), known as the Massey



HALIFAX PUBLIC LIBRARIES 2014

Exterior, 2014
Halifax Public Library
Halifax, Nova Scotia

Commission, for the integration of a national library and public archives. Although such an integration had to wait for more than a half a century, the *Report of the Royal Commission* (1951) was blunt in its verdict about the absence of a National Library, conveying the exhortations of many contributing organizations that “a national scandal requires national attention” (110).

The National Library came into existence in January 1953. After a period in the Public Archives Museum and an eleven-year exile in Tunney’s Pasture removed from downtown Ottawa, the new “\$13-million National Library and National Archives building, on Wellington Street overlooking the Ottawa River” opened in the Centennial year (Wees 20). As a copyright library, the National Library received gratis two copies of every book published in Canada, thus making its holdings a collection of record.

The efforts of successive National Librarians and National Archivists advanced the reputation of these two institutions on an international stage. In 2004 they were amalgamated as Library and Archives Canada (LAC). The result remains a topic of heated debate, pursued in the subsequent chapters of this Report.

The Bibliothèque nationale du Québec (BNQ) was created by law of the Québec legislature in August 1967 and was inaugurated in Montréal in 1968. This new library was the first institution in Québec that received the “nationale” qualifier and constituted a statement for the promotion of Québec culture (Lajeunesse 450). In 2006, the BNQ and Archives nationales du Québec merged to create the largest cultural institution of the province: Bibliothèques et Archives nationales du Québec (BAnQ). Its mission is to acquire, preserve, and disseminate publications, archival materials, and films constituting Québec and Québec-related heritage. In addition to the legal deposit for private publishers and the Québec government, BAnQ has the mandate to publish the Québec bibliography (*Bibliographie du Québec*) and the retrospective bibliography for titles published between 1764 and 1967 (Goulet). In conjunction with La Grande Bibliothèque, BAnQ blends “the function of a national library (legal deposit, national bibliography, preservation of Québec imprint materials, and other services) with the public service function of the municipal library in Montréal” in a spectacular new building, opened in 2005. These examples of harmonized institutions provide not only “impressive new flagship[s] for services” but a sharp contrast to the deteriorating circumstances at LAC (Wilson 729). Again, subsequent sections will explore this comparison.

“Streams of data, rich as they are, will illuminate rather than eliminate the unique books and prints and manuscripts, the richest possible mosaic of documents and texts and images,” that only the library and the archives “can put in front of you.”

We have certainly come a long way from the *Libraries in Canada* and the situations recorded by the Massey Commissioners. When American poet and Librarian of Congress Archibald MacLeish opened York University’s Scott Library in 1971, he understood the library as “an achievement in and of itself – one of the greatest of human achievements because it combines and justifies so many others” (358). He also maintained: “the true library asserts that there is indeed a ‘mystery of things’” (359). The seemingly endless possibilities of the digital age plunge us into this mystery, when we conceive “the shape information takes as it flows and clots, cascades and recombines” (Battles 211). Technology has changed how we acquire, use, distribute, share, and find information. Computers, databases, and different types of machine intelligence promote previously unthought-of connections; such new media can create new forms of knowledge. Helping us “to find features that texts have in common in ways that our brains alone cannot, computers are weak interpreters but potent describers, anatomizers,

taxonomists" (Best and Marcus 17). Such combinative potential forces us to declare distinctions between digital and preciously material artefacts. "Streams of data, rich as they are, will illuminate rather than eliminate the unique books and prints and manuscripts, the richest possible mosaic of documents and texts and images," that only the library and the archives "can put in front of you" (Grafton 324).

The services and architecture of many of our public, academic, and special libraries are grappling successfully with the mystery of the immeasurable strengths of the library: "it connects readers across cultures, landscapes, and traditions; it reunites exiles with their imaginary homelands; it offers the lost a gesture of belonging" (Gikandi 19). Libraries and archives are, ultimately, about the choices we make in a democratic society: to be exposed "to what is first rate in expression and articulation, [to] special training in the use of language and ideas, [to] a knowledge of the culture from which we grow" instead of assuming "that we can get along well enough spinning the thread of our unique and individual selves, personally, nationally, or humanly, out of a vacuum" (Rowland McMaster 44-45).

2 Institutions and Organizations



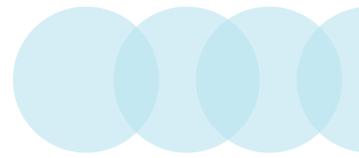
This broad-ranging examination of institutional structures attends to topics and challenges current in the domains of both libraries and archives. For the sake of clarity we generally treat these institutions under separate headings, but we do not want to minimize their complementary, at times shared, existence and symbiotic relationship. The prominent themes in this discussion include the importance of committed, engaged leadership; the provision and communication of public and professional services to Canadians; enabling regional, national and international partnerships and consortia; the planning and execution of technologically-enabled space; and the responsibilities and constraints of digital curation.

Many of the accounts we heard at our consultations were heartening and upbeat, filling us with the brio of how libraries and archives can change lives. But, others were poignant and disturbing, leaving us to wonder about the gaps and cracks. Together these accounts have left with us, and underline, a strong sense of the enduring human value of these institutions. As Gerald McMaster observes,

What fascinates me about the library and archives project is that it too has many faces and can be many things to many people. It will always be relevant; yet it also needs to change with the times in which we live. Our job is to prepare our institutions for the coming generations, not with restrictive definitions and practices, to give them the tools with which to see and learn, to ensure that the many voices, both past and present, continue to be alive and not dead.



BERNARD FOUÈRES



A. Library and Archives Canada

ISSUES ASSOCIATED with the status and future of Library and Archives Canada (LAC) recurred in our hearings, consultations, and deliberations. Concerns differed depending upon perspective (library versus archives). Most of the comments were both passionate in nature, and disparaging in tone: LAC's international relations were frequently described as "a national embarrassment."

As an institution, the Dominion/National Archives has provided distinguished service to all Canadians for more than 140 years; the National Library has served individual and institutional clients for sixty. Yet we must underscore the universal perception of a decades-long service decline of its component service elements - library, archives, and federal government records. More recently, this decline has been considerable; for example LAC has terminated the National Archival Development Program (NADP), ended its active public exhibition programming, cancelled the Portrait Gallery initiative, all but abandoned a presence in the heart of Ottawa at 395 Wellington Street by severely limiting its public services, curtailed its interlibrary lending in support of all Canadian libraries, reduced the ingest of manuscript and print (particularly rare Canadiana) collections, ceased collecting provincial and territorial publications, cancelled several of its highest profile digital projects, been inattentive to its web presence and its discovery and union catalogue technologies such as AMICUS, and introduced, without consultation or forewarning, controversial policy directives and other service reductions negatively affecting (even embargoing) individual researchers from pursuing their projects, as well as dramatically impeding the broader library and archives communities. It is claimed that budget inadequacies necessitated all of these changes.

We recognize that budgets have been curtailed; but we are concerned, if true, that the impact of the reductions has been made worse by budget transfers to the Canadian Museum of History. Whatever the aggregate causes, stakeholder sentiments finally erupted in 2012 as a result of unanticipated draconian service reductions, themselves prompted by the announcement of an additional three-year budget beginning in 2012-13 through 2014-15.

The extended narrative of discontent also must include the amalgamation in 2004 of the previous National Library of Canada and the National (formerly Public) Archives of Canada. The merger has not achieved the promise of its introduction. The late Terry Cook – archivist, Public, then National Archives manager, consultant, and mentor – wrote in a LAC- commissioned 2008 report:

It is often said, in various public forums by senior managers, that the complex merger creating Library and Archives Canada in 2004 is a work in progress. That is undoubtedly true. But there comes a time when the pace of progress needs to be quickened and clearer directions mapped if the momentum of transformation is to succeed. That time is now. (*Building the National Memory: Reflections, Prognosis, Inspirations* . . . 2008.)

Six years later, now on the tenth anniversary of the formation of LAC, the momentum of transformation appears badly stalled. Indeed, many now see a retrogression, rather than the anticipated benefits of convergence, which is manifest in the discord between the three resident professional cultures – librarians, archivists, and record managers. We are told that morale is at an absolute low, with some of the morale deficit attributed to human resource issues associated with the merger of the organizations. Whatever the causes, many see few signs of the benefits touted to flow from the convergence and insist that the situation at LAC has worsened. In Australia, New Zealand, and the EU the merger of LAC is presented as an appalling model to be avoided by libraries and archives.

Despite the regrettable reduction in budget (a reduction of \$9.6 million from 2013/14 to 2015/16), and the legacy of the merger, the mandate of LAC remains unaltered. The Library and Archives Act (2004), Section 7 clearly states that LAC is accountable:

- a) to acquire and preserve the documentary heritage;
- b) to make that heritage known to Canadians and to anyone with an interest in Canada and to facilitate access to it;

- c) to be the permanent repository of publications of the Government of Canada and of government and ministerial records that are of historical or archival value;
- d) to facilitate the management of information by government institutions;
- e) to coordinate the library services of government institutions; and
- f) to support the development of the library and archival communities.

The *Canadian Historical Association* (CHA) is one of the more attentive and well-informed groups concerned about the circumstances of LAC. Their concerns are those of citizens, as well as consumers of LAC services. Spokesperson Nicole Neatby stressed that LAC “is critical to the preservation, and more to the point, the never-ending process of creation, of Canada’s ‘national memory.’ It stands as one of the largest national repositories of primary source documents and most complete collection of secondary sources, visual documents, newspapers, etc. . . .” As consumers of services, Neatby noted that the members of the CHA “have a vested interest in the status and future of this national institution as users who have made it their career to build our country’s collective knowledge of the past.”

Whatever the budgetary imperatives facing LAC (and LAC still benefits from a \$90 million annual budget going forward), the fundamental statutory objectives are not being met whether in preservation of the patrimony for future generations or the facilitation of access to the documentary patrimony for present-day research. The Panel acknowledges the limitations imposed on LAC. We recognize it is a government agency bound by the constraints of Canadian Heritage and restricted by Treasury Board of Canada regulations and the Financial Administration Act. Its employees, like those in all government agencies, are subject to constraints on what they can say publicly. Thus, we believe that the remedy to the current circumstances also rests in large measure with Canadian Heritage, then Treasury Board of Canada and ultimately with the Parliament of Canada itself. The Panel is convinced that LAC needs far more support than successive governments have been prepared to show.

Most of the Panel’s petitioners agreed that LAC’s problems stemmed from a failure of leadership. As Tony Horava and Leslie Weir of the University of Ottawa stated:

Canada doesn’t lack leadership in libraries and archives – we have many committed, innovative and visionary leaders in our libraries and archives. What we are lacking is leadership at the national level. Such

leadership could create an encompassing vision allowing for a more cohesive approach during these times of radical change and provide a focal point for national and international collaborations.

Alongside the overarching need for support for LAC from the government in power, there is a need for the leadership at LAC to play a much larger national role, in particular to fulfill its mandate to support the development of the library and archival communities. We recognize that the expectations for LAC are diverse – situational in fact. Its challenge is to discern what will be required in all circumstances. LAC is a complex corporate undertaking. In the first instance LAC is, and must remain, a cornerstone Canadian memory institution in its own right, with a responsibility for collecting and preserving the national documentary heritage – including government records. These are its core interests and it is expected by Canadians to act in its own best interests – and theirs, although in the minds of many, the management of government records has taken a disproportionate amount of LAC resources. However, LAC's leadership role, by mandate, must extend to that of facilitator within the community of Canadian libraries and archives. It must provide inspiration to those same communities and its leadership must anticipate national or global circumstances. At all times, LAC must be collegial and transparent, so that it can once again enrich the culture of trust within the library and archival communities.

The embodiment of this complex corporate remit is the Librarian and Archivist of Canada. Concurrently with the Panel's activities, the Government of Canada was engaged in appointing a new incumbent. So concerned were twenty-two library and archival associations about the leadership qualities of the individual to be appointed that they came together in a coalition to provide the Government of Canada on May 24, 2013 with a list of the leadership skills and qualifications required for this leadership position.

Almost a year later, on April 14, 2014, the Minister of Canadian Heritage and Official Languages, the Honourable Shelly Glover, appointed Guy Berthiaume as Librarian and Archivist of Canada effective June 23, 2014. Most recently Berthiaume was President and Chief Executive Officer of the Bibliothèque et Archives nationales du Québec, and previous to that had a career as university teacher, researcher, and administrator. Given Berthiaume's longstanding commitment to the principle of access, his "cheval de bataille" or charger according to a member of the Panel, we anticipate invigorated energies at LAC.

We congratulate Berthiaume but would remind him of Horava's and Weir's statement:

We are also deeply concerned with a profound lack of respect for the Canadian library and heritage communities with regard to consultation and collaboration – this has been a form of window-dressing, without any substantive process to constructively engage with our communities. This needs to change if the relationship is to improve, and we hope and expect that the next leader at LAC will be qualified to address the challenges and will keep this firmly in mind developing strategies for rebuilding networks of trust and collegiality.

Among the most startling contrasts in the development of partnerships in the last decade, one that has played out on a national media stage, is the sharp divide between the integration of LAC in 2004 and the harmonization of Bibliothèque et Archives nationales du Québec (BAnQ) in 2006. Since the issue of convergence links these two institutions, different in their practices yet similar in their aims, it is worthwhile to attend to the processes of consultation and fully realized disciplinary respect that undergirded the foundation of BAnQ, as explained by one of its foundational figures, Couture:

Having been a player in the set-up of the Québec model, allow me to describe more precisely. Created in 1920, the Archives nationales du Québec were, until January 31, 2006, in the Ministry of Culture, Communications, and the Status of Women. From 2004 the Québec government had asked la Bibliothèque nationale and les Archives nationales to study the possibility of a merger. After mature reflection and a wide consultation of concerned parties, it was decided to move to action and to merge the two institutions. By doing so, BAnQ made a deliberate choice to base its merger process on a philosophy guaranteeing absolute respect for the specific characteristics of each discipline, library and archival sciences, that is harmonization. Integration would rather have aimed at incorporation, inclusion, indeed assimilation of one discipline by another, with the result that librarians would be the same as archivists and that archivists would also be librarians. This approach did not seem desirable to us in the least and, even less in the context of Québec, where archive and library institutions, their programs of professional formation and association

have held and hold always great respect for specific disciplinary characteristics.

The Panel does not advocate the reversal of the merger of the Library and Archives of Canada at this moment, as such a reorganization would deplete resources and entail a disruption of services even further. However, it believes that LAC and the Minister of Canadian Heritage and Official Languages share the burden of proof that Canadians are better served by a merged LAC than by two separate but coordinated institutions. The Minister has an onus to prove that a merger based on the forced integration of professional values and practices rather than on harmonization is conducive to fulfilling LAC's mandate.

It has been some time since a Librarian and Archivist of Canada has worked with the library and archival peer leadership, that is the chief executives of member institutions from the *Canadian Association of Research Libraries* (CARL), the *Canadian Urban Libraries Council* (CULC), the *Canadian Library Association* (CLA), the *Association pour l'avancement des sciences et des techniques de la documentation* (ASTED), the *Association of Canadian Archivists* (ACA), the *Association des archivistes du Québec* (AAQ), the *Canadian Council of Archives* (CCA), and the *Canadian Historical Association* (CHA). As a result, many national initiatives over the past ten years have lacked relevant federal participation and suffered accordingly. Berthiaume must re-engage, and be supported in that re-engagement by the Minister of Canadian Heritage and Official Languages, and assume the appropriate leadership role as circumstances dictate, and take his seat with real and sustained participation.

The Librarian and Archivist of Canada must also involve this same leadership in a transparent dialogue about the needs of those relying on LAC services. We sympathize with the challenge presented to LAC by budget reduction, as do the majority of LAC's institutional stakeholders who know that changes are required to cope with declining resources, since they have been similarly tested. Institutional stakeholders face restrictive policies and protocols from provincial or territorial legislatures. They know also the tension created by individual stakeholders' desire to maintain existing levels of service, as opposed to an objective and critical assessment of what is needed juxtaposed with the funding realities. But, dialogue - lacking in LAC decision-making for a decade or more - can often achieve compromise solutions. In this regard, stakeholders also know that with some consultation they can help coordinate new processes to address service gaps. The curtailment by LAC of InterLibrary loan (ILL) is a good example. Although cancellation of ILL had little impact on urban or larger academic libraries, it did affect

Berthiaume must re-engage, and be supported in that re-engagement by the Minister of Canadian Heritage and Official Languages, and assume the appropriate leadership role as circumstances dictate, and take his seat with real and sustained participation.

rural and remote libraries and smaller college libraries that utilized LAC ILL and related discovery services, such as the LAC union catalogue AMICUS, as a matter of default. Satisfactory solutions could have been found. Compensating measures such as a modest last copy service from LAC, founded on a greater community reliance on the collections of the large urban public libraries (CULC) and the research-intensive university libraries (CARL), could have been pursued. Negotiating the further participation of small libraries in regional systems, combined with other cooperative services such as OCLC's WorldCat discovery database with its 943 currently participating Canadian libraries, might likewise have mitigated the effect of LAC's reduction of discovery services, such as the union catalogue AMICUS. Regrettably no attempt was made to manufacture such alternative services.

Another example is the drastic reduction of the LAC budget for private acquisitions. Librarians report that Canadian materials available on the national and international auction market, whether manuscripts, maps or rare books, are more than ever before leaving Canada. Before major cuts to its budget, such items were generally acquired by LAC. Now academic libraries or major public libraries offer the only chance of retaining or repatriating such items, although their budgets, modest to begin with, are also and already very tight. Too often, private collectors from other countries are acquiring Canadian treasures. Partnerships in acquisition could be explored.

LAC's communication with the community may mean taking time to fully engage stakeholders in its new initiatives such as the Pan-Canadian Documentary Heritage Network, the Whole of Society Approach (WoSA) to acquisitions, the Core Digital Strategy, or the Trusted Digital Repository (TDR) Initiative. From the LAC perspective, all are intelligent responses to current pressures or opportunities, but the library and archival communities, let alone informed Canadians, are confused. Few of these initiatives have found mention within the similar responses being undertaken by the community stakeholders such as CARL or CULC, or other individual institutions or groups of institutions. This lack of cooperation and coordination is regrettable; however, it again presents new opportunities for the Librarian and Archivist of Canada. Berthiaume (and his successors) must act to fulfill the institution's mandate in preserving and making accessible the documentary heritage of Canada and supporting the value and role of libraries and archives, whether the corresponding initiatives relate to a national strategy for both analogue and digital preservation, whether they facilitate a national archival network or a national lending system, or in any other relevant endeavour. But, LAC

must internalize that the responsibility for the documentary heritage is shared and that responses need community coordination.

Finally, the Panel is sympathetic to those who are distressed, particularly researchers who have relied upon the LAC library and, more particularly, the archival and government record collections. We appreciate that today they find their scholarly endeavours frustrated by limitations on their requests for material and by the lack of available and knowledgeable staff. There has been shared unease, and in many cases dismay, about the way LAC responded to budget cuts. We trust these critics will support our recommendations, and continue to promote positions aligned with the intention of making LAC once again a positive presence in the array of Canadian libraries and archives.

But, LAC must internalize that the responsibility for the documentary heritage is shared and that responses need community coordination.

Recommendations

THE PANEL RECOMMENDS that the Librarian and Archivist of Canada:

1. develop by July 1, 2015 or earlier, a five-year strategic plan, in consultation with all relevant stakeholders, to provide a clear path to meeting the goals articulated in Section 7 of the Library and Archives Act. *Inter alia* this plan must define the scope of the “documentary heritage” that LAC would commit to acquire and preserve, and would establish measurable benchmarks for LAC to “support the development of the library and archival communities.” Such a plan would also include plans for periodic evaluation of progress toward meeting these goals.
2. participate actively on the boards/councils of those associations in which LAC has membership – e.g. CARL, CULC, ACA/CCA/AAQ, etc. In addition, he should develop a schedule of initial engagement with all provincial and territorial associations/councils.
3. use whatever organizational means possible, including expert outside consultants on systemic human resource policies, to deal with the morale issues within LAC.
4. establish a special task force of key members within the library and archival communities, as well as key stakeholder communities such as the Canadian Historical Association (CHA), to assess, over a two-year period, the progress made in harmonizing cultures in LAC. At the end of

the two years the task force will submit a report, with recommendations, to the Minister of Canadian Heritage and Official Languages relating to the continuation of a merged institution.

5. participate actively in and reassert Canada's presence, with full support of the Minister of Canadian Heritage and Official Languages, in the international community of libraries and archives.
6. engage the Minister of Canadian Heritage and Official Languages, as well as officials in Canadian Heritage, Treasury Board of Canada, and other federal agencies as required to review and revise if necessary the enabling policies and protocols that inhibit the fulfillment of the LAC mandate as expressed in the Library and Archives Act (2004), and which seem to prevent LAC from performing at a level in keeping with the expectations of Canadians and the best practices of similarly situated national libraries and archives.

LAC Testimonials

Jane Urquhart

Novelist and Poet

**Winner of the Governor General's Literary Award
for *The Underpainter* (1997)**

LIKE MANY OTHER CANADIAN AUTHORS, I was approached in the 1990s by the literary manuscripts department of the then National Library of Canada about purchasing my archives for their collection.

I was happy to comply. The first accession was a purchase by invoice, and the second and third accessions were deeds of gift from me.

During the nineties and early 2000s, I not only did research but I also consulted my own archives both at the National Library and later, when the National Library and National Archives merged, at Library and Archives Canada. The archivists that I dealt with were both knowledgeable and helpful and the experience was always enriching.

In recent years, however, all queries I have addressed to Library and Archives Canada have been met with utter silence regardless of the avenue of approach.

I have been unable to contact an archivist concerning any research I may want to undertake. I have been unable to gain access to drafts of unpublished works in my fonds. In fact, I have been unable even to find a way to get through the front door.

I am happy to report that things have improved in the last few months and that I am now back in touch with the wonderful LAC archivist, Catherine Hobbs who has resumed literary portfolio activities. However, I now feel uncertain about entrusting current and future archives to what has seemed to be such an unpredictable organization.

Dr. Ronald Rudin

Trudeau Foundation Fellow

Professor of History

Co-Director, Centre for Oral History and Digital Storytelling

Concordia University

Montréal, Québec

MOST RECENTLY, I have been trying to secure documents dealing with a federal program (the Maritime Marshlands Rehabilitation Administration) that operated between 1948 and 1970. In trying to figure out what the LAC had on the question, I wanted to speak to an archivist who would be knowledgeable about the matter, only to discover that there are no longer archivists who deal with the public on matters dealing with a specific collection with which they have some familiarity. Instead, I was directed to a “generalist” archivist, who was clearly overwhelmed with the number of files on her desk. I was allowed a brief (15 minute) consultation, following which I was free to raise other questions, but her responses were intermittent at best. I discovered (as have many other users) that a number of the collections that interested me had finding aids that had not yet been digitized (It is beyond my understanding why finding aids have still not been digitized). The archivist (overworked and with no real background on the subject) took the initiative to send me parts of some finding aids, but in the end I had little choice but to consult the full finding aids during a visit to Ottawa (guaranteeing that a second visit would be required).

As for that visit, I came up against the LAC rule (at least the rule posted on their website) that only ten items can be ordered in advance of a visit, and such orders need to be filed days in advance. (I should note here that none of the documents that interested me had been digitized, and so any further leads that

came up during the visit would only result in the delivery of further documents days later.) Needless to say, particularly at the start of a project, a user can go through ten items quickly. After numerous requests, I discovered that a user can submit numerous requests, but with no more than ten items on any one request. For what it's worth, no one would put this in writing, but the system worked as was explained to me on the phone.

To be fair, when I arrived in Ottawa, all of the files were available. Some had required ATIP clearance and this had been done in a timely fashion. Of course, I spent part of the visit going through finding aids (and the archivist whom I had spoken with could not be reached to discuss the matter further while I was on site), and now need to travel to Ottawa once more.

I am sure that there are stories that are more dramatic, but you might keep in mind that I have 40 years of experience with using the LAC, and so I can only imagine how the various barriers would have discouraged someone doing this for the first time; and Montréal is close to Ottawa, so the need for subsequent trips did not bother me as much as they might someone in, say, Vancouver. In the end, I have no complaint with any of the LAC staff, all of whom were courteous and clearly overworked. But the absence of sufficient staff to answer questions in a knowledgeable and timely fashion, together with the absence of digitized finding aids, make the process unnecessarily complicated.

User, Professor of History

I HAVE HAD a number of frustrating experiences with LAC and my concerns are not only with the institution but with the Access to Information regime in Canada more broadly. I hope this is something that the Royal Society of Canada is taking into consideration in its report.

Below is a summary of one of my more frustrating experiences with LAC access though it concerned private records and not government records.

In brief, in January 2013, I identified a number of seemingly important records in the Richard Bell Fonds at LAC. Richard Bell was Minister of Citizenship and Immigration from 1962 to 1963 during the critical years of reform when the universal points system for skilled workers was first introduced in Canada. I e-mailed a request to consult the records to LAC only to be told that the records were still closed ("pending review by appropriate department"), though the bulk of the Richard Bell collection was donated in 1968. Even more serious, I was told that due to staff

cutbacks as a result of the Workforce Adjustment Program, LAC did not have the resources to review my request and see if the closed records could be opened. The manager responsible for Reference Services was made aware of my concerns after I asked to speak with him directly. He was sympathetic but it became clear that there was little that he could do given the operational directives at LAC. The formal complaint I submitted to the Information Commissioner of Canada was refused because that office's mandate only covers government records and has no jurisdiction to rule on LAC's operations beyond the accessibility of government records. It was a frustrating experience and to this day, these records remain inaccessible.

Dr. Mireille Paquet

Professor of Political Science

Concordia University

Montréal, Québec

I DO COMPARATIVE RESEARCH on public provincial politics. The period on which I work pre-dates, more or less, the systematic digitization of internal documents and official publications of these departments; as well, it is positioned before the spread of the Internet in Canadian public administration. Therefore, it is difficult, from the outset, for researchers to have access to collections and the body of documents, without undertaking expensive trips across the country. Because I found a wide range of documents from ten provincial governments, LAC allowed me to fulfill innovative research and to do so by maximizing the financial resources I received from public institutions. Now that these documents – public by nature – are no longer accessible, it will no longer be possible for scholars to conduct research on Canada in an efficient and productive way. This state of affairs affects me particularly, since I am working to complete revisions of my first publication and I could benefit from a second look at this collection.

B. Library and Archival Associations

LIBRARY AND ARCHIVAL ASSOCIATIONS PROLIFERATE – provincially, regionally, and nationally. There are over 115 such organizations – the vast majority associated with libraries (*Libraries Canada, 2013/14*). On the archival side this number does not include the *Association of Records Managers & Administrators – Canada Region* (ARMA) and its fourteen chapters. These associations often provide consortial services, or services



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directly in aid of the end user. There is, indeed, an overlap of function as some consortia have assumed professional development and advocacy programming roles similar to that claimed by many associations. Consortial organizations as identified by membership in Consortia Canada have not been included in the estimate above but have been so included in the Consortia section of the Report.

Organizations are either institution-based, individual-based, or some combination of the two. The size and composition of the membership determine the operational and financial model of the group and influence the intent and range of their activities. At one end of the spectrum groups enjoy a social function – usually a local forum to exchange ideas, organize seminars, and simply appreciate a professional camaraderie. At the other end are those associations with a pan-Canadian mandate and greater depth of development programming, including conferences and workshops; they tend to engage in advocacy activities, as well as public and governmental relations.

A few examples will be useful. The *Greater Edmonton Library Association* (GELA), the *Foothills Library Association* (FLA), and the *Halifax Library Association* (HLA) are local groups with membership from all types of libraries and with the intention of promoting libraries within their communities.

Canada is served by provincial and territorial library and archival associations (the latter sometimes referred to as Councils) from sea to sea to sea – from the *British Columbia Library Association* (BCLA) and the *Archives Association of British Columbia* (AABC), the *Newfoundland & Labrador Library Association* (NLLA) and the *Association of Newfoundland & Labrador Archives* (ANLA), to the *Northwest Territories Library Association* (NWTLA) and the *Archives Council Nunavummi* (ACN). Each of the 24 organizations has a broad membership base that embraces all possible membership types: practicing professionals, including technicians and others who work in libraries and archives, vendors, and members of the public (including trustees) who simply have an interest in these institutions. All associations rely on institutional members (all types and in the case of archival associations also museums, heritage, and historical organizations) to augment their financial and material resources for the purpose of supporting programs. The Panel is concerned that very few business archives (Bank of Canada, Maple Leaf Foods, Hudson’s Bay Company Archives, Pratt & Whitney, etc.) are members of a provincial/territorial council.

The largest and most diverse of these associations are in Ontario, the largest province. The *Ontario Library Association* (OLA) and *Archives Association of Ontario* (AAO) have over 5,000 and 300 members respectively. The former, unlike other

The group of pan-Canadian archival associations is more structured than the library associations.

regional associations, has divisions representative of academic libraries, public library boards, public libraries, and school libraries. The latter, like most other regional archival associations/councils, maintains an Archives Advisory Program providing complimentary direct advice to archives and archivists anywhere in the province. Since its inception in 1991, the Ontario Program has provided over 1,000 site visits to archives across the province, over 8,000 responses to phone, fax, written, and email enquiries on archival issues, and approximately 300 special addresses and talks promoting archival programming.

Finally, there are pan-Canadian associations of various types. There are two broad-based associations with national personal and institutional membership – the *Canadian Library Association* (CLA) and the *Association pour l'avancement des sciences et des techniques de la documentation* (ASTED) – which also has both national and provincial characteristics. Both claim bilingual audiences but in fact relate to anglophone and francophone stakeholders respectively. There are other associations that draw their membership from across the country, but cater to types of libraries. For example, two of the largest and most influential are the *Canadian Association of Research Libraries* (CARL) and the *Canadian Urban Libraries Council* (CULC). In addition, there are the *Association of Parliamentary Libraries in Canada* (APLIC), the *Association of Canadian Map Libraries & Archives* (ACMLA), and those representing faith-based institutions such as the *Association of Jewish Libraries* (AJL), the *Prairie Association of Christian Librarians* (PACL), and the *Church Library Association of Ontario* (CLAO). There are also two chapters of the US-based *Special Libraries Association* (SLA) in Toronto and Western Canada, and numerous associations at the national and provincial levels for health libraries and law libraries.

The group of pan-Canadian archival associations is more structured than the library associations. The duality of the *Association of Canadian Archivists* (ACA) together with the cognate francophone *Association des archivistes du Québec* (AAQ) is typical of professional organizations exercising some degree of oversight on the activities of the Canadian archival community and competencies of its corpus of professional practitioners. In many activities, such as advocacy, standardization, professional development (conferences, workshops, etc.), and international liaison, the ACA and the AAQ work together.

Complementing the intentions of the ACA/AAQ, as well as the community of 800 federal, provincial, municipal, rural, corporate, personal, faith-based, media-focused, and institutional archives is the *Canadian Council of Archives* (CCA). The CCA is the mechanism devised to make that system function optimally, that is, to create from the parts a collective that comprises the sum of archives in Canada for

the benefit of all stakeholders, particularly those who use archives. For additional commentary, see the Canadian Archival System section of this Report.

Associations contribute substantively to the current status of Canadian libraries and archives, and we anticipate that they will continue to do so. However, there are many, and in the case of the library sector there is considerable fragmentation. Volunteers for governance boards and committees are increasingly difficult to recruit. Multiple membership fees are a continuing challenge for many practitioners. We believe the associations should add more value particularly in three arenas – professional development, awareness building (including professional branding), and government relations.

Canadian libraries and archives have marvelous stories to tell. Our public consultations clearly proved their services contribute substantially to the creation and maintenance of our civil society. They allow us to discover who we are, and provide us with the information and knowledge fundamental to the sustainability of the Canadian way of life. As our process of consultation was designed to solicit stories, we naturally heard from numerous Canadians. But we also realized that many more Canadians have no notion of these stories and thus do not appreciate the resultant or potential impact of these institutions on their everyday lives, whether as members of the general public, or students, or corporate and government officials. More disturbing, those in roles of power and influence (municipal councilors, members of provincial legislatures, members of parliament, university/college administrators, and corporate executives) were also generally unaware. Although many associations listed advocacy programs as a key activity, when the Panel asked more specific questions about such programs, we found little evidence that they had adequate resources or planning or that they had much impact. This is a serious gap. We hope that both the library and archival communities can adjust their programs to be more successful. Canadians, as residents and constituents, need to know the social and personal role of libraries and archives.

The archival networks are structured appropriately to ramp up their activities. The federated nature of the CCA from the perspective of respecting the archival patrimony – its organization and its preservation – and the professional perspective of the ACA/AAQ also working with the CCA provide the levels of awareness building and government relations that we believe are required. Our expectation will undoubtedly demand more personal and professional attention, as well as requiring more financial resources than are currently devoted to the enterprise. These resources need to be somehow leveraged from constituent members, in the first instance to deal with provincial and territorial stakeholders, and then from and

Over the past decade, organizational dissonance led to chronic introspection and took attention from the Association's primary mandate. However, we were also encouraged to learn that the community is now meaningfully engaged in the reconception of this national association.

through the provincial network structures to the national level, the latter to be the domain of the ACA/AAQ/CCA. Nonetheless, we believe that investment of time and money will improve both the future of archives and their use by Canadians.

The library community is larger than the archival community, with a greater number of organizations, many with competing aspirations and in competition for institutional and personal members. It also is fragmented. There is no hierarchy linking the capacities of the provincial/territorial/regional associations with the library associations designated by type, and then with the recognized national voices, such as exists within the archival community. A cacophony of perspectives and debilitating competition often emerges. Currently CLA and ASTED are acknowledged as the anglophone and francophone voices of the Canadian library community and recognized as such by the federal government and its ministries and agencies, as well as by international governmental and non-governmental organizations. Here, however, we concentrate our attention on CLA, the most vulnerable of the library associations, but the best positioned and indeed recognized as the best to advocate nationally on behalf of all libraries.

CLA's ability to meet expectations (often expressed in unrealistic terms or misrepresented by critics) is a widespread concern. A number of issues conspire to weaken CLA: the maturity and competition of provincial associations creating legitimate alternatives to what was the CLA advantage for many years; the changing demographics of the national professional cohort as recent generations relished more local and regional alternatives offering networking opportunities rather than general national organizations; the perceived superior relevancy of out-of-country professional options, particularly specialized associations; and finally, the cost of multiple memberships. As a result CLA has suffered, with both individual and institutional memberships in decline. We are advised by current CLA President Marie DeYoung that "the future of the Canadian Library Association is tenuous and if a more robust funding model is not achieved in the very near future, its viability is at risk."

We found that over the past decade, organizational dissonance led to chronic introspection and took attention from the Association's primary mandate. However, we were also encouraged to learn that the community is now meaningfully engaged in the reconception of this national association. We wish to assist in this transition, as it is our opinion that such a transition is absolutely critical to the future of Canadian libraries, and is now essential to retain the trust that Canadians have placed in this organization to represent their best interests. We would emphasize that real change is the key, program focus is the goal, and needed alignment of a sustained national perspective will result.

Recommendations regarding archival associations:

THE PANEL RECOMMENDS THAT:

7. CCA initiate a dialogue with all the component organizations, including the ACA/AAQ, to discuss the ways and means to enhance the resources available for a vibrant, national awareness campaign intended to remind Canadians repeatedly of the importance and essential utility of archives in the life of the nation.
8. CCA review the accountability structures of the various elements of the archival system to ensure that on relevant national and international policy issues and particularly matters relating to the security of the national patrimony all components of the archival system are aligned and have no discordant voices.
9. the provincial ministries charged with responsibility for their provincial archives and by extension the provincial archival network review funding for the provincial network council/association to ensure that the necessary resources are in place to continue participation and reporting to ARCHIVESCANADA.ca. (See also The Canadian Archival System and Libraries and Archives Collaborating for Canada's Documentary Heritage.)

Recommendations regarding library associations:

THE PANEL RECOMMENDS THAT:

10. CLA focus its activities in five areas: (1) continue to perform MLIS program accreditation as well as professional qualification adjudication in conjunction with the American Library Association; (2) undertake practice-focused, evidence-based market research (both self-initiated and contracted); (3) create a vibrant, national awareness campaign intended to alert and remind Canadians about the importance and essential utility of such capacities in the everyday life of the nation; (4) engage in federal government relations and the development of public policy; and, (5) promote and represent Canadian libraries and librarians internationally within the global community of libraries.

11. CLA reconceive itself as a federation of national provincial/territorial and other national associations (not unlike the network structure of the Canadian archival community). The Association would be guided by a defined Council which would have properties such as: *ex officio* status for all provincial/ territorial associations or an agreed-upon rotating subset of these associations; *ex officio* status for ASTED, CULC, CARL, and the *Provincial and Territorial Public Library Council* (PTPL) and observer status for such organizations as the ACA, AAQ and the *Canadian Museums Association* (CMA).
12. the current Executive Council of CLA prepare an inaugural business plan to initiate the negotiation of a funding model leading to the approval of the above constituent associations, with the intention of introducing a compulsory and contractual levy to underwrite the work of CLA, that approval not to be denied by the constituent associations for reasons other than an assessment of effective delivery of service in the five defined areas. CLA will not engage in activities in competition with its federated constituents. Each subsequent year the outcomes of the business plan will be reviewed by the reconstituted Board and a renewed plan adjudicated, and ultimately approved and funded.

C. Library Consortia

WE WERE GRATIFIED TO LEARN that libraries have come to look first at collaborative solutions when faced with perceived common goals. According to a submission by the *Royal Nova Scotia Historical Society*:

Collaboration between cultural heritage institutions, such as the decades-old NovaNet Consortium of academic libraries in Nova Scotia and the work of the Council of Nova Scotia Archives, emphasizes the value and importance of such ventures. Opportunities continue to arise for collaboration among researchers and libraries and archives and between public and private sector institutions. These initiatives may have been prompted by the need for efficient use of resources, particularly financial resources, but the benefits of collaboration include synergies arising from the perspectives of related cultural heritage institutions, among others. Collaboration can lead to better

rationalization of mandates of institutions and their related strategies to encompass the cultural heritage of the province, region, and country.

Librarians are predisposed to work together. Collaboration has been enabled by a number of protocols, standards, or innovations created by international coordination.

Library consortia and similar alliances have increased over the course of the past quarter century (on collaboration in archives see the The Canadian Archival System section). The impetus to cooperate increased as automated information management systems matured, as licensed digital resources became available, and as the necessity of multi-institutional access to resources became the norm rather than the exception. These ventures not only extend an institution's ability to meet client expectations – in ways usually invisible to the client – but also generally make sound financial sense due to the pooling of resources and thus enhanced operating efficiencies. They also reflect the contours and expectations of our networked information world.

Librarians are predisposed to work together. Collaboration has been enabled by a number of protocols, standards, or innovations created by international coordination. At times, these have demanded national compromise because they need universal acceptance to be effective (e.g., Cataloguing rules, Classification Systems, Machine Readable Records, MARC Standards, InterLibrary Loan protocols, Union Databases, etc.). Indeed OCLC, the largest cooperative in the world with 16,737 members or participants, of which 943 are in Canada, has created the largest and most utilized union catalogue with 300 million records (13 million contributed by Canadian libraries) in 486 languages, and 2 trillion local location listings of which approximately 93 million are in Canada. This amazing accomplishment, made possible by universal standards, provides a platform employed by member libraries to develop capacities such as InterLibrary loan, catalogue creation, and collection development.

The realization of the power of collective action based on universally established standards and protocols is clear at local and national levels. We discovered that Canada has produced near 40 consortia intended to bring like and multi-type libraries together. These are self-governing by the membership, and aim to improve existing library services, or enable new and innovative services that would be impossible to provide independently. In the beginning these consortia were often simply fora to discuss issues of common interest. Discussion quickly gave way to action, initially to develop techniques and technologies to share resources, primarily print, for the purpose of expanding access. Then, with many documented successes the consortia members began to address other opportunities where coordinated cooperation seemed appropriate, particularly

within a technology- and connectivity-enabled network. These consortia also frequently overlap in programming with library associations by offering members (and sometimes non-members) development opportunities including conferences, seminars, and webinars, as well as engaging in advocacy activities.

A quick look at some current consortia reveals both creativity and diversity. *The Alberta Library* (TAL) allows the patrons of over 300 provincial libraries of all types to access the resources of each of its members by a single search and provides access to vast resources through its digital library and database licensing initiatives. TAL's Netspeed Conference is focused on the innovative usage of technologies in libraries. The *Saskatchewan Multitype Library Board*, the *Manitoba Consortium Inc.* (MLCI) and the *British Columbia Libraries Cooperative* (BCLC) are similar, but membership of the latter is almost exclusively restricted to public libraries. The *Réseau des services documentaires collégiaux* (RESDOC) serves 42 Québec colleges; the *Ontario Colleges Library Services* (OCLS) serves its college members. In addition to streamlining operations and collections development, many of these provincial consortia engage in provincial advocacy activities.

Other consortia serve more focused ends. The Alberta *NEOS Library Consortium* with seventeen institutional members at 47 library sites and *Novanet* in Nova Scotia with eleven institutional members at 28 library sites provide their respective academic library members with a shared information management system. Specialized consortia such as the *Electronic Health Library of BC*, the *Health Knowledge Network* in Alberta, the *Health Science Information Consortium* of Toronto, the *Western Ontario Health Knowledge Network*, and the *Atlantic Health Knowledge Partnership*, provide health information collections and licensed databases to their respective members.

Database licensing is a dominant business activity of Canada's consortia. Two-thirds of the membership of Consortia Canada (an informal forum for such Canadian groups) is engaged in this activity, working primarily provincially or regionally. Canada's most innovative organizational consortium in this space is the *Canadian Research Knowledge Network* (CRKN), a national licensing agency established in 2000 by CARL representing 75 university libraries from all Canadian provinces. Given its national mandate, its scope, and its purchasing power, the CRKN's intervention in the market with its procurement model has had considerable impact, within and outside of Canada. Clare Appavoo, CRKN Executive Director, envisions even more dynamic possibilities for her organization. In her brief she notes that "as a national organization, we have the capacity to be an effective driver of a unified digital ecosystem in Canada, to collaborate with

other organizations and potentially coordinate multiple initiatives to create a much more robust ecosystem within Canada so that our research and teaching community can be competitive in the global research environment.” Despite its renown, some members of the research library community question CKRN’s efficacy and wonder whether its negotiated agreements benefit all segments of its membership equitably. To its credit, however, CKRN has overcome an often key inhibitor of effective consortial activity; that is, it has brought together members with like interests and needs from all provinces.

Equally striking is the *Ontario Council of Libraries* (OCUL), a multifaceted consortial venture comprising Ontario’s 21 university libraries and serving nearly 500,000 students. It embraces many of the traditional elements of collective enterprise such as materials purchasing, collaborative planning, advocacy, assessment, professional development, and advocacy.

OCUL’s flagship service to students and faculty of the member institutions is Scholars Portal. This shared technological infrastructure is an inventive platform that serves several purposes: access to licensed electronic books and journals; exposure to public domain open access publications and digitized materials; rapid InterLibrary lending; and, the organization, preservation, and facilitation or re-use of electronic research and geo-spatial data. Technological tools and techniques have been installed in partnership with institutions and agencies beyond Ontario.

Other important OCUL initiatives are the Scholars Portal Accessible Content E-Portal (ACE) and ODESI (pronounced Odyssey), the Ontario Data Documentation, Extraction Service, and Infrastructure Initiative. ACE is a growing repository of accessible format texts available to users with print disabilities at participating OCUL institutions. The repository has developed a collection of over 1,350 texts in five accessible formats (two types of PDFs, Text, DAISY, and ePub) in the past twelve months. Users with verified print disabilities are given access to browse, search, and download texts from the secure repository through their home institutions. Users can also request additional texts to be added to the repository through their accessibility offices. ACE began as a pilot project in 2012 and was made possible by collaboration between OCUL and the University of Toronto, with support from the Government of Ontario as a part of the EnAbling Change Program. This program is an initiative of the Accessibility Directorate of Ontario and provides financial support and expertise to organizations to educate an industry or sector across the province on their obligations under the Accessibility for Ontarians with Disabilities Act (AODA). ACE transitioned to an ongoing Scholars Portal service in 2014.

The impressive success of OCUL and Scholars Portal rests on the critical mass of institutions located within a single provincial jurisdiction and operating within common policy parameters.

ODESI is a web-based data exploration, extraction, and analysis tool. It is the product of a unique partnership between university libraries, business, and government, which greatly improves access to statistical data for researchers, teachers, and students. ODESI enables researchers to search for survey questions (variables) across hundreds of datasets held in a growing number of collections. It supports basic tabulation and analysis online, and allows for the downloading of most datasets into statistical software for further analysis. ODESI provides unprecedented access to extensive collections of polling and social survey data. Key polling data collections include Canadian Opinion Research Archive (CORA), Canadian Gallup, and Ipsos Reid. Statistics Canada's public-use survey data forms the core of ODESI's social survey data holdings. ODESI inspires, develops, and supports excellence in quantitative research, data publishing, and statistical literacy. It is of benefit to both experienced and beginning researchers. It introduces undergraduates to data literacy and data discovery at an early stage in their careers; it provides the experienced researcher the ability to search immediately across hundreds of datasets and collections, allowing for faster and more meaningful data reviews, and instant access to data for further study.

The impressive success of OCUL and Scholars Portal rests on the critical mass of institutions located within a single provincial jurisdiction and operating within common policy parameters. Other regional partnerships have more limited consortial properties. The *Council of Atlantic University Libraries* (CAUL) with its seventeen members supports the purchase of electronic resources, provides a directory of library-related systems in use at CAUL libraries, and supports collaboration and innovation through annual grants awarded to staff at CAUL member institutions. It also provides seed funding and ongoing support for the *CAUL Atlantic Islandora Repository Network* (CAIRN), a regional digital asset repository centered at the University of Prince Edward Island for use by all CAUL institutions to steward digital assets. The eighteen Québec university libraries and BANQ are members of the *Sous-comité des bibliothèques*, part of the *Bureau de coopération interuniversitaire* (BCI, formerly CREPUQ). The BCI members collaborate on consortial acquisitions of digital resources, collecting statistics and developing projects and services. For example, the BCI created and coordinates an ILL service and a BCI card that provides all Québec students and faculty members access to all academic libraries in the province. Founded in 1991, the *Council of Prairie and Pacific University Libraries* (COPPUL) with its 23 members located in Manitoba, Saskatchewan, Alberta, and British Columbia is a regional consortium of university libraries providing leadership in the development of collaborative solutions

addressing the needs of academic information resources and staffing development. COPPUL works cooperatively with counterpart consortia in the other regions of Canada – OCUL, CAUL, and BCI in Québec. All of the regional groups collaborate in bi-lateral or multi-lateral relationships when opportunities arise. In all cases, the goal is to create efficiency for member libraries and to conduct programs on a scale that is appropriate to the activity.

Lack of a common policy and funding jurisdiction is constraining for these regional consortia. Karen Keiller, Chair of CAUL, stated the challenge of stable funding in her submission:

One of the greatest inhibitors is the uncertainty of stable funding extending ahead over a two to three year period. All universities in Atlantic Canada are experiencing funding challenges and this has a direct impact on libraries. There are difficulties in capitalizing on provincial grants because CAUL/CBUA spans four provinces, and there are relatively few federal grants which are applicable for post-secondary academic libraries.

Initiating and sustaining initiatives in a multi-jurisdictional environment is a significant challenge. Even so, most libraries in Canada benefit by some engagement within a provincial, regional, or national consortia. Despite the challenge of divided jurisdictions, Canadian libraries and their consortia systems are leaders in collaboration meeting or exceeding the activities of other countries. The future lies in expansion of these sorts of arrangements as Horava and Weir of the University of Ottawa have noted:

Leveraging our consortial partnerships (provincial, national, research discipline-focused) in order to obtain the greatest possible economies of scale in relation to library services and collections is important to us. We focus on initiatives and opportunities to build upon economies of scale in how we provide not only licensed scholarly content but infrastructure services, such as resource sharing, 'back end' systems and cloud-based workflows to provide the necessary management of our resources. Building upon the collective knowledge and expertise of our consortial partners as we work towards innovative solutions that draw upon our collective strengths is a strategic goal for us.

Recommendations

THE PANEL RECOMMENDS THAT:

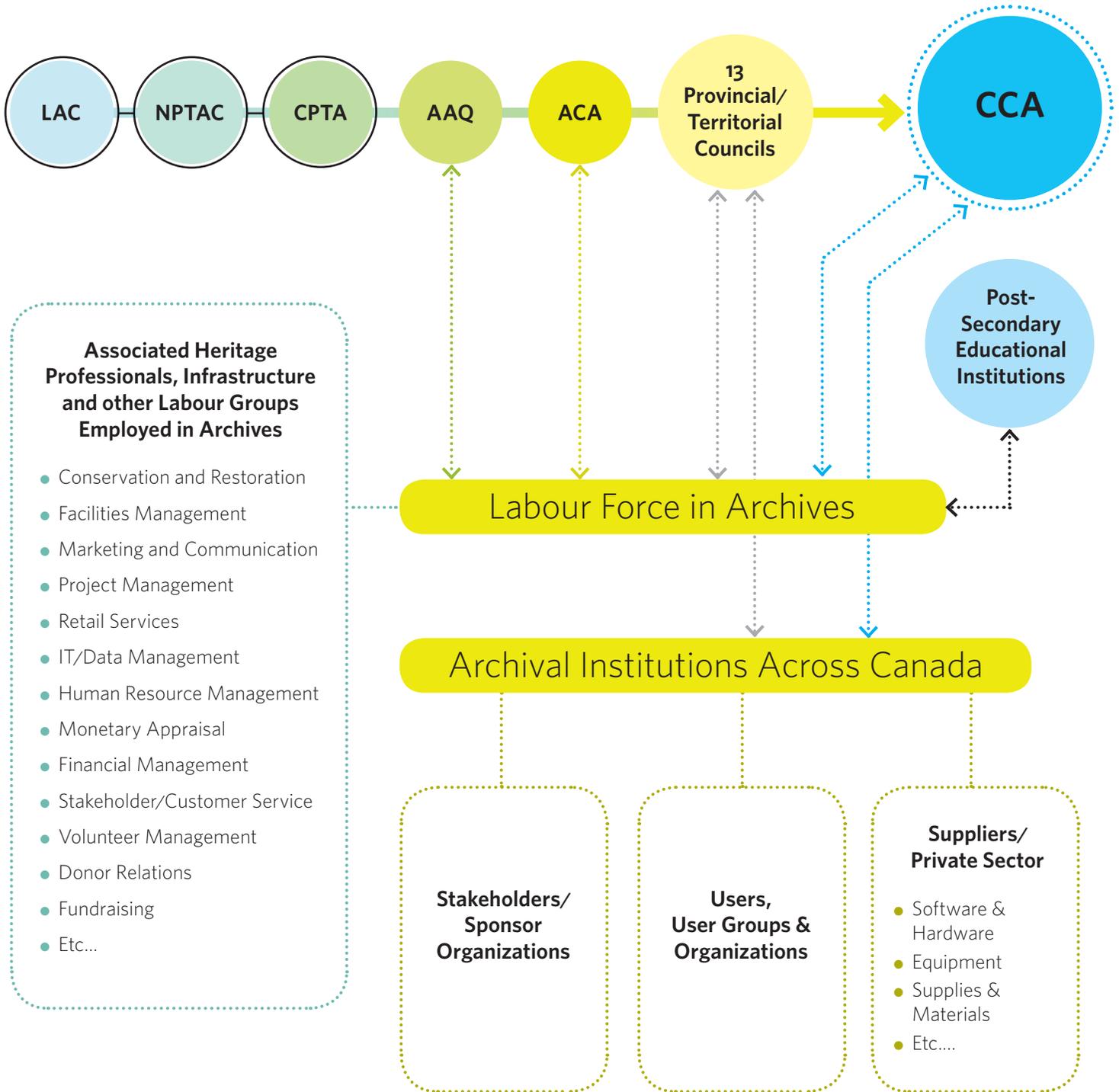
13. provincial ministries charged with post-secondary education in the Western region (British Columbia, Alberta, Saskatchewan, and Manitoba) and the Atlantic region (Newfoundland & Labrador, New Brunswick, Prince Edward Island, and Nova Scotia) gather together in their regions to discuss ways and means of coordinating or identifying a pathway for the resourcing of collaborative activity amongst COPPUL institutions and CAUL institutions and thus fostering innovation and cost savings in the respective regions.
14. all consortia focus on their services to members, and through their members to the clientele of those institutions utilizing the member's services and collections. They should be measured in their relations with governments focusing only on matters associated with their primary services; and, in other matters they are encouraged to partner with relevant national or provincial/territorial associations to coordinate advocacy activities.
15. all consortia, but particularly those with significant financial exposure by constituent members (e.g. CKRN, OCUL, COPPUL, CAUL, etc.), commit to external assessment regularly to determine whether the original value proposition that prompted their establishment is still valid.

Client search discovery, and not the pooling of resources for service development or collections purchase, is the value proposition for the multi-layered archival networks.

D. The Canadian Archival System

ARCHIVES FACE FUNDAMENTALLY DIFFERENT CHALLENGES to cooperation. Such cooperative/collaborative activity as exists within the pan-Canadian archival community is quite different from that evidenced in library consortia. Client search discovery, and not the pooling of resources for service development or collections purchase, is the value proposition for the multi-layered archival networks. As Richard Valpy, the retired archivist for the Northwest Territories, observes, the ability of archival repositories to participate in collaborative or collective initiatives, particularly in acquisition, is constrained as archives are often housed within a larger institution. Despite these constraints, we admire the system of national and

Canadian Archival System



provincial/territorial archival networks and we have highlighted these organizations and their cooperative accomplishments in another section of this Report.

The Canadian archival system encompasses individual archives, provincial and territorial councils of archives, professional associations, and the *Canadian Council of Archives* (CCA). On the CCA, the *Association of Canadian Archivists* (ACA), the *Association des archivistes du Québec* (AAQ), all thirteen provincial/territorial archives councils, and the *Council of Provincial and Territorial Archivists* (CPTA) are represented, while the National Librarian and Archivist is an *ex officio* member. The CCA, thus representing a community of 800 federal, provincial, municipal, rural, corporate, personal, faith-based, media-focused, and institutional archives, is the mechanism devised to make the Canadian archival system function optimally, that is, to create from the parts a collective that comprises the sum of archives in Canada for the benefit of all stakeholders, particularly those who use archives. The diagram, from LAC's *Reframing the Archival System* (2014) report, illustrates at a glance the inter-connectivity of the Canadian Archival system.

A specific role is attributed to the thirteen provincial/territorial archives. Paraphrasing Ontario's Archives and Recordkeeping Act, provincial/territorial archives are mandated by legislation (a) to ensure that the public records of the province/territory are managed, kept, and preserved in a useable form for the benefit of present and future generations; (b) to foster government accountability and transparency by promoting and facilitating good recordkeeping by public bodies; and (c) to encourage the public use of the archival records as a vital resource for studying and interpreting the history of the province/territory. Some provincial/territorial archives have also the explicit or implicit mandate to acquire private records of provincial/territorial significance. Provincial/territorial archives not only preserve records of archival value and provide access to the public; they are required to promote good recordkeeping by public bodies and to assist historical research, as well as encouraging archival activities in the province/territory. For example, the Provincial Archives of Alberta (PAA) encourage people to preserve and protect their own records and family history: during a visit, the Panel saw the PAA shop (there is also an online store) with archive-quality preservation supplies and storage containers, and heard about conservation and reproduction services.

The CPTA aims to ensure active participation by provincial and territorial archivists in the national archival network and a close working relationship with the CCA. In this endeavour the CCA acts as the agent for the complementary

institutional components that make up the system, including the provincial and territorial networks, which have corresponding coordinating councils. The network of national, provincial, and territorial networks and their respective councils outwardly appears a complex accountability structure. However, it has been effective in focusing the national dialogue and the resulting narrative on archival issues. It is much admired for developing major research discovery assets, for example ARCHIVESCANADA.ca. Today, elements of the network in some of the smaller provinces are under stress for lack of adequate funding and the cancellation of the National Archival Development Program (NADP).

ARCHIVESCANADA.ca is a gateway to archival resources found in those 800 repositories across Canada. This archival portal is maintained by the CCA and is a joint initiative with the provincial/territorial archival networks, as well as LAC. Provincial and territorial councils, their members, and LAC provide all archival descriptions and links contained in the searchable database.

The Panel heard from several commentators the need for expanding the inclusiveness and enhancing the effectiveness of the archival system. There is a collective responsibility for Canada's archival heritage affecting all owners or holders of public and private archives; the presence of systemic, demographic, and ideological hurdles necessitates reaching out to a larger community for understanding and support. In his submission, Valpy points to a systemic deficiency in the current Canadian archival system:

No matter what types of archival materials are managed – corporate, church, personal, government, or otherwise – the vast majority of archival repositories in this country are institutionally based. That is, they are established and managed by a larger institution, such as: a government agency, a university, a community group, a business, or a non-profit organization. These archival institutions exist to perform a specific, mandated task: either to acquire and manage institutional records and archives, or to acquire and preserve non-institutional archives for specific research purposes. Because these repositories are answerable to their institutional masters, their ability to participate in collective initiatives, particularly in the area of acquisition, is constrained. Their first priority is to their own organization, not to the wider archival community or Canadian society.

What is missing, in his estimate, is an independent entity with the mandate to promote, support, sustain, and expand Canada's documentary heritage

The presence of systemic, demographic, and ideological hurdles necessitates reaching out to a larger community for understanding and support.

wherever it is found and, most importantly, composed of a board of directors that includes representatives from outside the archival community. Valpy's vision is a truly inclusive public engagement:

For Canada to move forward with any collective archival effort, we must stop relying only on archival institutions and archival professionals. We must engage the public in the important goal of valuing society's records and archives, so that the archival community can perform the services archivists perform best: helping institutions preserve their documentary heritage and, thereby, creating a truly sustainable national archival system.

For Marie-Andrée Fortier, Coordinatrice des services d'archives de l'Union canadienne des Moniales de l'Ordre de Sainte-Ursule, the dwindling population of sisters as volunteers in religious archives reflects another reality, one shared by archivists of Les Soeurs de Notre-Dame du Saint Rosaire, the Congregation of the Sisters of Saint Joseph, and the Sisters of Providence. Fortier draws attention to the rich history of the Ursulines in Canada, as the first teaching community in North America devoted to the education of English and Aboriginal girls, a history with parallels in the areas of hospital care and social work for other orders. Rather than witness this trace of the past being lost forever, she proposes practical regional solutions. "The solution would be to put in place regional centres of religious archives that would bring together the different religious communities in the same diocese and would share the services of acquisition, treatment, preservation, and dissemination of their historic documents."

The archival community should rethink the custodial approach.

However, the Panel believes that enlarging the number of repositories or enlarging the capacity of existing repositories cannot be the only solution to safeguard Canada's future archival heritage. The archival community should rethink the custodial approach, as Laura Millar advocates both in her Archives Summit presentation and in her *Archivaria* article. Archivists, Millar writes, should help public and private record creators:

understand how to manage their records effectively so that they remain authentic, reliable, and valuable now and into the future, whether or not the materials ever find their way into a custodial environment. This role is advisory, not custodial, and it must be performed much earlier in the recordkeeping process, before records are in real danger.

Recommendations

THE PANEL RECOMMENDS THAT

16. CCA expand its membership to include representation of major stakeholders in the public and private sectors engaged in the preservation of and access to Canada's documentary heritage.
17. CCA sponsor the process by which provincial/territorial archives councils, AAC and AAQ redefine the archivist's relationship with individuals and communities, helping them to preserve and nurture their own documentary heritage, for their benefit and for the benefit of society as a whole.

E. Libraries and Archives Collaborating for Canada's Documentary Heritage

LIBRARIES IN CANADA have a long history of successful collaboration across sectors and between large and small, well-funded and poor, and rural and urban institutions. Such collaboration is likely to become stronger as technology driven needs and costs rise, especially if public funding does not keep pace. (Gerald Beasley, UAL, AB)

The Archives Canada national online database of archival descriptions is the collaborative creation of the Canadian Council of Archives, the provincial and territorial archives councils and associations, and archival institutions throughout the province. The small and decreasing amount of funding for archives has driven and institutionalized collaborative approaches within the Canadian archival community - there is simply no other way to achieve what we feel are major projects. (Michael Gourlie, PAA, AB)

Most of Canada's libraries and archives are small, understaffed, and underfunded. For example, according to the president of the Canadian Council of Archives (CCA), 64% of archival institutions have a discretionary budget of \$10,000 or less. In order to survive and to be able to continue services to their communities, many if not most libraries and archives collaborate with other institutions at local, provincial/territorial, and national levels. In some cases this has meant the merging of library and archives programs or of archives and

The success of converging libraries, archives, and museums depends upon finding the right balance between respecting professional expertise and merging systems.

museum programs. Examples range from the Hinton (AB) Municipal Library and Archives, the Chilliwack (BC) Museum & Archives, the Boissevain & Morton (MB) Regional Library (including the Community Archives), the Royal British Columbia Museum (which includes since 2003 the British Columbia Archives), and BAnQ, to the federal Library and Archives Canada (LAC).

A recent study by scholars from the University of Toronto and l'Université du Québec, with Wendy Duff and others, found that the success of converging libraries, archives, and museums depends upon finding the right balance between respecting professional expertise and merging systems. Collaboration and convergence can be doomed by the failure to recognize different disciplinary work practices, processes, and outputs, or the difficulties of reconciling variant standards. As Panel member Ketelaar has observed in *Archifacts*, "most, if not all, successful mergers between libraries and archives, sometimes with a museum too, have not happened at a national level, top down, but in places where they are embedded in a local or regional community with a strong sense of identification, self-understanding and commonality, like Friesland, Québec, and Tasmania." According to Guy Berthiaume, président-directeur général BAnQ speaking at the 2013 Association des archivistes (AAQ) Congrès:

Even if several functions surrounding the management of information are common to library and archival sciences, and even if, in the two cases, the aim is to acquire, to preserve, and to make accessible information whatever its form, there exists nevertheless important differences between the two disciplines....These differences have direct impacts on professional practice of each one and represent real challenges.

According to an OCLC report, "Beyond the Silos of the LAMS" (2008), the collaboration continuum ranges from contact, through cooperation, coordination, and collaboration, to convergence. Cooperation is often included in the mandate of libraries and archives. For example, by law many provincial archives, as section 15 of the Nova Scotia Public Archives Act makes clear, have to "co-operate with and undertake activities in concert with organizations interested in archival and records management matters by means such as exchanges and joint projects." BAnQ has to «susciter la coopération entre les bibliothèques publiques et les autres réseaux de bibliothèques et agir comme bibliothèque d'appoint pour l'ensemble des bibliothèques publiques du Québec. (Article 15).» The Librarian and Archivist of Canada is tasked, among other things, to:

- enter into agreements with other libraries, archives or institutions in and outside Canada;
- provide leadership and direction for library services of government institutions; and,
- provide professional, technical and financial support to those involved in the preservation and promotion of the documentary heritage and in providing access to it. (section 8)

Collaboration often starts with the question: “What can we do together?” It is a “process of shared creation” of “something that wasn’t there before.” That “something” is not just a new idea, but a transformation among the collaborating institutions.

I. REGIONAL LIBRARY BOARDS AND ARCHIVES COUNCILS

Contact, cooperation, and coordination are the primary missions of Canada’s regional library boards and archives councils. Canada’s 69 regional library systems (or equivalents) play a special and vital role in the delivery of public library services. The governance and structure of these organizations vary from province to province and appear to have developed to suit both political and practical circumstances. From a governance perspective, unlike independent public library boards, regional boards tend to be populated by representative elected officials from participating communities. As to programming, some models distribute accountability between the participating community libraries with the administrative centre the first among equals; other models centralize most functions at the administrative centre with little or no independent decision-making at the community-branch level. Both seem workable, though anecdotal feedback seems to favour the former.

Regional/territorial archives councils or archives associations (as in British Columbia, Alberta, Manitoba, Ontario, and Québec) differ from regional library boards both in governance (by professionals rather than by elected officials) and in programs. Contact and cooperation through the provincial/territorial archives councils are not restricted to archival organizations (community archives, university and religious archives, provincial, city and rural archives, and aboriginal archives); they are joined by museums, heritage and history organizations, educational establishments, advocacy and support groups, and a few libraries. Some provincial/territorial councils receive funding from the provincial government either directly or

through a foundation (e.g. New Brunswick, Alberta). Some employ a professional staff (e.g. Alberta, Ontario) or contract advisory services (e.g. British Columbia). Other councils formerly dependent on the NADP have been forced to resort to volunteers and to cut programs. As a result of the April 2012 elimination of the NADP, six professionals at the CCA secretariat and eleven archival advisors and conservators across the country lost their jobs

Apart from maintaining the union list of archival descriptions that feeds ARCHIVESCANADA.ca, the gateway to archival resources found in over 800 repositories across Canada, the provincial/territorial archives councils mainly provide advisory services, professional training and education, and grants programs. All archival descriptions and links contained in the searchable database are provided by provincial/territorial councils, their members, and LAC, which also maintains the union catalogue containing bibliographic descriptions of the holdings of more than 1,000 Canadian libraries. The *Artefacts Canada* database (maintained by the *Canadian Heritage Information Network*, or CHIN) contains close to 4 million object records and approximately 800,000 images from Canadian museums. Following the lead offered by such portals as *Europeana.eu* and national integrated libraries, archives, and museums (LAM) portals like the *Finnish National Digital Library* and the *Deutsche Digitale Bibliothek*, Canada would gain immeasurably by building tools to coordinate searching of these three great databases.

At the 2013 AAQ Congrès, Berthiaume pointed to the benefits as well as the challenges of doing this in an assessment of the new interface *Images*, which he described as “certainly one of the most beautiful examples of merger of work within an institution”:

This interface devoted to the promotion of pictorial resources spread out in our patrimonial collections and our archival fonds is one of the most consulted digital collections on our portal. The conception and realization of this new tool of dissemination were not self-evident in an institution with two distinct catalogues, Iris and Pistard. *Two catalogues*, and therefore, *two traditions* of analyzing and cataloguing documents, as well as rules and procedures proper to one or the other discipline. There was a real challenge to address for circulating from within a single research tool pictorial documents with origins from one part and printed collections and archival fonds from another part. Thanks to a common mission and an untried harmonization of archival and library practices, coupled with the innovative support of the digital team

associated with the project, this challenge was met. Solutions have been found in the matter of management and metadata, which permits BAnQ today to offer to its users a discovery tool that responds equally well to the needs of the general public and those of researchers.

II. DIGITAL CURATION

There are large and important differences between digital publications and electronic records, particularly in “their descriptive metadata requirements, their volume and, in many cases, their logical file formats” (Bak and Armstrong 291).

The library and archives communities face significant challenges in collaborating on digital curation. As Christopher Lee and Helen Tibbo observe, digital curation is “stewardship that provides for the reproducibility and re-use of authentic digital data and other digital assets. ... Digital curation extends far beyond repository control and involves attention to content creators and future users.” Libraries and archives would benefit from access to joint trusted digital repository (TDR) services rather than each continuing the maintenance of individual digital repositories. LAC’s recent affirmation of its commitment to develop its TDR program is welcome, as is its desire to implement a strategy for national TDR collaboration (as announced by Hervé Déry, Acting Librarian and Archivist of Canada, at the Archives Summit).

Yet as Luciana Duranti and Corinne Rogers of the University of British Columbia argue in their background paper for the Archives Summit, “Records creating institutions and organizations are moving to the cloud in increasing numbers ... It would be extremely difficult to acquire control of their materials selected for permanent preservation by moving them to an in-house Trusted Digital Repository (TDR), especially considering their massive amounts.” Duranti and Rogers propose to centralize the Canadian born digital archival holdings in cloud storage. “Certainly, before choosing the cloud option, the archival system would have to address standards for service levels, security, and interoperability/reversibility. A Canadian archival cloud would need to provide much more than storage, enabling all the archival functions in a framework of distributed responsibility.”

Most archival repositories are established and managed by a larger institution and exist to perform a specific, mandated task. This situation threatens the inclusiveness of collaborative arrangements to unlock the Canadian documentary heritage – whether print or archival. On the other hand, cooperating

“A Canadian archival cloud would need to provide much more than storage, enabling all the archival functions in a framework of distributed responsibility.”

with others has benefits and may result in gains that can convince the parent institution of the efficacy of collaboration.

Collaborative arrangements for digital and analogue storage need not be restricted to archival institutions. In “Coming Up with Plan B,” Laura Millar suggests that:

the ideal partners for collaborative initiatives might be research institutions such as university or college libraries and special collections. After all, their core mandate is to collect and preserve sources of information and evidence – publications, archives, ephemera, grey literature – specifically to support research and the dissemination of knowledge.

A Canadian archival cloud could also accommodate research data. In the Panel’s consultations, academics, librarians, and archivists were united in one regard: whether at the institutional level or nationally or internationally, the organization and preservation of research data, created as both product and by-product of the research enterprise, were not being adequately addressed. By way of pilot projects, both the research library and archival communities have made great strides in identifying the policy frameworks and the necessary workflow processes to deal with the issues.

III. COLLABORATION ACROSS DISCIPLINES

Lack of formal communication channels between libraries and archives nationally may result in redundancy – missed opportunities to share work, expertise, and resources when transitioning to new service models. (Clare Appavoo, CRKN)

The Panel believes that more could be gained by inter-institutional and inter-professional (galleries, libraries, archives, museums, and others) collaboration within each province/territory and across all provinces/territories. There are still opportunities not yet fully explored. As the *Royal Nova Scotia Historical Society* submitted:

The benefits of collaboration among libraries and archives as well as other cultural heritage institutions should be emphasized. Financial pressures alone warrant further attention be given to this point. Greater

Collaboration should be based both on shared values and on an understanding of differences in professional values and practices.

rationalization of efforts and synergies of collaborative ventures will be a primary outcome. Collaboration requires leadership and at a national level, Libraries and Archives Canada should be empowered to provide pan-Canadian leadership.

Speakers at the Archives Summit stressed that collaboration should be based both on shared values and on an understanding of differences in professional values and practices. For example, all professionals in libraries, archives, and museums are engaged in the protection of privacy and cultural rights, but librarians and archivists have an extra duty to protect the privacy of users, while archivists have to protect the interests of the record subjects, including prisoners, asylum seekers, adopted children, patients, and clients. Such differences in professional values and practices, Greg Bak and Pam Armstrong argue, cannot always be overcome by converging technologies.

We have received many comments favouring respectfully understood convergence. In his address to the 2013 AAQ Congrès, Berthiaume reminded us:

Without ignoring the traps that total merger implies, the experience of the last years at BAnQ demonstrates clearly that there is an advantage to archivists and librarians working together. And this approach is based on a premise that could not be clearer: librarians and archivists work on the same object, “information.”

The submission from *Novanet* predicts:

Missions of libraries, archives and museums will become increasingly aligned with similar interests in preserving knowledge and digitizing collections. Cultural shifts and the willingness to work together will be challenging in the years ahead, but libraries, archives and museums are stronger working as partners. Strategic partnerships will be imperative to establish economies of scale to seek and achieve mutual opportunities. (Lynne Murphy, *Novanet*)

And from *Public Library InterLINK* we heard:

Any consideration of the role of government must include the need for collaboration amongst libraries. The future of libraries in many ways will depend on how well that collaboration is supported and encouraged. (Michael Burris, *PLInterLINK*, BC)

IV. COLLABORATION THROUGH THE INFORMATION CONTINUUM

According to the 2013 position statement of Martin Berendse, the President of the *International Council on Archives* (ICA), it is “a matter of increasing urgency” that archivists “re-position themselves as the information managers of modern society, where information is valued as a great asset.” Archivists, he continues,

should be vital players in achieving key objectives of public policy, including democratic accountability, administrative transparency and protection of citizens’ rights. Without efficient record-keeping systems, major public policies such as Open Government and Open Data simply do not get off the ground. In the information age the archivist should be equipped to manage, preserve and to make publicly available records of all kinds created in digital form.

It is “a matter of increasing urgency” that archivists “re-position themselves as the information managers of modern society.”

The Archives Summit background paper of Duranti and Rogers makes a similar claim:

Now more than ever archivists must position themselves at the side of the creators if they wish to be able to fulfill their organizational mandate: they need to identify records and data worthy of capture and long-term preservation at creation, determine their capability to be preserved, and monitor their use and transformations through time. This means understanding the changing boundaries between public and private, organizational and personal, author and owner, creator and preserver, producer and user, and the attributes of the *producer*.

It is vital that archival requirements are taken into account in the creation and management of current records, out of which the future archival heritage is constructed. As the Statement of Principle of the Council of Australasian Archives and Records Authorities underscores, it is equally vital that citizens can be sure that the appraisal of public records and their transfer to archival custody are done properly, in a timely fashion, and with involvement of relevant stakeholders. This activity should be regulated in archives and records legislation, with more detailed provisions in regulations. In many Canadian constituencies, archival legislation and regulations are not up to date, or they are ambiguous about the roles and powers of records creators and archival agencies.

There is the compounding difficulty of unavailable or ungathered reliable statistics.

We note that archives and records legislation in New Brunswick dates from 1977, in British Columbia from 1979 (amended in 1995), in Newfoundland and Labrador from 1983 (amended 1989), in Nova Scotia from 1998, in Manitoba from 2001, and in Ontario from 2006. With regard to British Columbia, we have learned that inadequate legislation is the main reason for BC's deadlock in regard to the transfer of government records to the Royal BC Museum, which is depriving citizens of their rights in terms of BC's archival heritage. Couture notes the enlarged definition of archives in Québec to include information technologies and the preliminary stages of a major revision of the 1983 law on archives being undertaken in that province.

In addition to lags in legislation, there is the compounding difficulty of unavailable or ungathered reliable statistics. Provincial archive councils and provincial archives seem to be very reluctant to publish statistics on the web. LAC does not publish statistics on holdings or users. Barbara Craig carried out the latest survey of the archival labour force, *A Look at a Bigger Picture*, in 1998, and the last annual report from CCA on their website is from 2005. Statistics Canada data, available only in limited form and for purchase, focuses on museums with archival facilities attached. The Panel views the lack of current and comprehensive statistics as a serious impediment to collaboration.

Recommendations

THE PANEL RECOMMENDS THAT:

18. provincial, territorial, and municipal governments enact a policy on information management that defines information management and recordkeeping roles and responsibilities, comparable to the Treasury Board Secretariat's *Policy on Information Management* (<http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?section=text&id=12742>).
19. provincial, territorial, and municipal governments review and update the legislation and regulation of archives, reflecting the principles of the Universal Declaration on Archives adopted by the General Conference of UNESCO, 10 November 2011, and the digital requirements which have transformed society in general and the world of information in particular.
20. provincial and territorial archive councils and provincial archives in collaboration with the Canadian Council of Archives (CCA) and LAC



HALIFAX PUBLIC LIBRARIES 2014

Interior, 2014
Halifax Public Library
Halifax, Nova Scotia

undertake to gather and publish current and comprehensive statistics about holdings and users.

- 21.** the *Provincial and Territorial Public Library Council* (PTPLC), the *Canadian Council of Archives* (CCA), and the *Canadian Heritage Information Network* (CHIN) in partnership collect, develop, and advertise best practices of inter-institutional and inter-professional (galleries, libraries, archives, museums, and others) collaboration within a province/territory and across all provinces/territories.
- 22.** the Federal Government establish a Libraries and Archives Collaboration Fund, to be administered jointly by LAC, CARL, CLA, and CCA to stimulate collaboration within the library and archives communities and from which innovative collaborative projects of libraries together with archives, libraries with libraries, and archives with archives, are funded.
- 23.** LAC facilitate and receive funding for the development of a strategy for national TDR collaboration while extending such a strategy to cloud storage, in consultation with relevant stakeholders from the library and archives communities and beyond. Special attention should be given to advance the business case for institutional archives whose primary mandate is the management of their parent institution's records and archives.
- 24.** LAC and CHIN start a joint project to explore the possibilities of building tools for coordinated searching of the existing descriptive databases.
- 25.** library and archival institutions, associations, councils, and other bodies look for alliances, if appropriate, with other organizations in the cultural and cultural heritage sectors.



The realities and prospects of collaboration, the growth of repositories, and plans for the cloud, all affect the way information seekers, especially researchers and writers, do their work. As a reflection of the benefits and anxieties created by digital curation and collaborative arrangements, biographer and historian Charlotte Gray provides this glimpse of her current research practice.

As a freelance biographer and historian working from home, my research gets easier all the time.

I'm preparing a profile of NDP leader Thomas Mulcair for *Walrus* magazine. Thanks to Google, I can have instant access to his official website, his Twitter account and even (via a Genealogy website) his ancestry. If I go to the websites of various news outlets, I can find articles about him and statements by him since he entered politics two decades ago. Before I leave my keyboard and finally meet my subject in real time, I have a mountain of background information.

I'm writing a chapter about painter Emily Carr for my next book. Once again, I plunge into online research. I can find images of her most famous works, and at Project Gutenberg Australia I can read the full text of her books *Klee Wyck* and *The Book of Small*. I can watch both a "History Minute" and a short National Film Board of Canada documentary about her. I can glance through the short biographies of Emily Carr posted by leading art galleries, check the references, then order either new, secondhand or library copies of the major biographies.

And I haven't left my desk.

The Internet has revolutionized my life – and I love it. Twenty years ago, when I was writing my first book, I spent hours in libraries and archives, looking for both primary and secondary sources related to my subject. I acquired shelves of reference books so I could check spellings, dates, details – and I often found I didn't have exactly what was needed so had to visit the library anyway. Today, the only essential reasons to leave my writing space are to meet my subjects in the flesh, if they are living, or, if they are no longer with us, to spend time on any archived diaries, letters and papers that I've located that have not been digitized. I have no doubt that, in a few years time, I'll be able to meet the second category of subject via hologram.

What I once consulted for free may now lie behind a pay wall. I don't object to this: I've always had research costs. What I used to spend on travel and photocopying, I now spend on access. If I want a hard copy, I can just press "Print." A *New York Times* article from 1930 seems cheap at \$3.95 – particularly when it takes a nanosecond to appear on

my screen. It is a matter of indifference to me where the information comes from (public or private source, archive or library holdings) as long as the content is reliable and the price reasonable.

What an improvement! What a brave new world!

But I have an uncomfortable feeling that something has been lost in the rapid evolution of our libraries and archives. It affects me as both a consumer and a producer of contributions to our national culture.

My major problem is that I don't know what I don't know. I can skitter about on Google, checking websites and following links, but I'm only as good as my own choice of Key Words. In the past, I could consult professionals and enjoy serendipity as I walked around libraries and archives. In libraries, I might notice on the shelves books that enlarged my knowledge of a subject or a period, but that I might not have discovered by searching an online catalogue. A curator of rare books might not only help me order up a particular volume, but also suggest books of a similar date for comparison. In an archive, an archivist might explain a Finding Aid to me, then add the magic words, "And you might also be interested in..." And then there were those casual conversations with staff or other researchers during coffee breaks — conversations that gave me new avenues to explore or angles from which to view my subject.

Now I spend so little time away from my study that there is less chance for serendipity to occur. And when I do walk into an institution, there are far fewer professionals on the floor to share their expertise with me.

And because I am a freelance writer, I have less access to the online university librarians available to students.

So I trawl through the Internet, hoping to find online catalogues, research networks such as <http://www.archeion.ca/repository/browse>, along with institutions' finding aids. Solo navigation of these networks can be frustrating: I feel like an eighteenth-century voyageur in charge of a twenty-first century powerboat. I'm sure there are mediators out there, happy to help me: after all, most of these collections are publically-financed and freely available to the public. But making the connection is a challenge.

Moreover, other countries are moving forward at warp speed in this area. The not-for-profit Digital Public Library of America, established in April 2013 to make available all the intellectual riches accumulated in American libraries, archives and museums, already links 1,300 institutions in all fifty states. Europeana is a similar enterprise that is aggregating the holdings of libraries in the twenty-eight member states of the European Union. The two systems have technological infrastructures designed to be inter-operable. [See Robert Darnton, "A World Digital Library Is Coming True!" *NYRB* 22 May 2014]. How do I access these systems? Will Canada's intellectual riches be networked into these networks? As a user, I am ignorant of the ever-expanding resources that may or may not be available to me.

My second challenge is that I may be so overwhelmed by my Google harvest that I forget that not everything has been digitized. Yes, there are all the official government records, and prime ministers' private papers including Prime Minister Mackenzie King's notorious diaries, and images from major Canadian painters, and significant texts. Yes, there is a smorgasbord of other material – but it is not comprehensive. Less than 10 percent of material held by Library and Archives Canada, for example, is available in digital form.

Researchers must constantly remind themselves that selection decisions have been made when material is collected and again when it is digitized. Each generation re-evaluates what is important to collect, and which voices from the past should be preserved. As the diversity of Canadian society has increased, and the "master narrative" of our history exploded, we can see how values have shaped and continue to shape the stories that survive. There are threads in our past that were ignored because they were deemed "unimportant": the culture and history of North American First Nations and Inuit, the lives of slaves in eighteenth-century British North America, stories of early women settlers. Until recently, our institutions have been deaf to groups that preserve their stories within oral rather than written histories.

One of my interests is women's history, as a doorway into Canadian social history and a strategy for encouraging contemporary readers to understand the past through the lens of the present. But the kind of



JEFF PAPINEAU

Sam Steele collection
Bruce Peel Special
Collections Library,
University of Alberta

material in which I'm interested may be the kind of records that previous generations did not value — records of women's organisations, recipe books of prairie farm wives, household accounts books. If these primary sources were preserved, they may still be considered low priorities to be digitized. And if I don't leave my desk, I won't find them.

As a user, I prefer access to on-line resources to be free. As a producer of content, I want to protect my copyright - a fight that my own professional organisations (The Writers Union of Canada, Access Copyright) are conducting for me. I am a full-time author, and it takes me at least two years to write a book: I expect to make a living from my profession. However, in the rush to digitize holdings, authors' copyright is constantly in jeopardy (Google Book Search was stopped only by a US Federal Court from digitizing millions of books still in copyright, then selling subscriptions to the resulting database.) Extracts from my ebooks are printed out for use in various high school and university courses, under the "fair use" section of the Canadian copyright law: I get no fee for this.

I find myself in the contradictory position of wanting my books to be part of the worldwide library I see on the horizon, while resenting the fact that many users now assume that access to those books should be free. And I fear that if Canada's intellectual riches are not part of the worldwide surge of information, our history will be downgraded even further than it is already.

F. Archives and Communities

ARCHIVES (small, big, and medium) have a bit more of a challenge as traditionally they cater to a specialized audience: those who are interested in history and those who are genealogists. I believe the key here is involving young people and educating them about archives and what they have to offer. Archives are for everyone! (Denise Daubert, AB)

In the pursuit of substantive, productive partnerships, archival diffusion needs to be more than outreach for the purpose for securing future users. It needs to be informed by the needs of Canadian society as a whole so that people will understand the role that formal archives play and how they can be supported in the creation of their own community histories. These two streams, that of formal institutions and more community-based initiatives, complement each other and create the possibility for mutually beneficial partnerships; not to mention the enhanced advocacy in support of archives that will undoubtedly result from individuals who feel they have a vested interest in the country's future (Laura Madokoro, McGill University, at the Canadian Archives Summit).

With the Internet, every person can become his or her own publisher, author, photographer, film-maker, music-recording artist, and archivist. Each is building an online archive. So, too, are countless nongovernmental organizations, lobbying groups, community activists, and "ordinary" citizens joining together [...] And they are creating records to bind their communities together, foster their group identities, and carry out their business. (Terry Cook 113)

Communities should be empowered to look after their own records.

Rather than having their records taken away, communities should be empowered to look after their own records, assisted by professional archival expertise and archival digital infrastructures. As Cook argues, mainstream archival institutions need to:

... listen as well as speak, becoming ourselves apprentices to learn new ways (and, sometimes, very old ways) that communities have for dealing with creating and authenticating evidence, storytelling memory-making, documenting relationships that are often very different from our own. Aboriginal or indigenous people have especially

rich traditional cultures in this regard from which we could learn much, as do some women's and ethnic communities' perspectives around story, memory, and evidence. (Cook 114)

Models can be envisioned where mainstream archives and communities assume distributed custody of the communities' memory texts. For example, the *Archif Menywod Cymru/Women's Archive of Wales* (<http://www.womensarchivewales.org>) rescues material evidence of women's lives and experience in Wales and places these materials in existing repositories (archives, museums, libraries) where they will be documented and preserved to professional standards, and made accessible to the public. Operating along the same lines is the Italian-Canadian Archives Project (ICAP), a network of researchers and organizations that reach out to communities across Canada and connect them with experts in Italian-Canadian history and public archives. ICAP encourages families, communities and organizations to share with local archives or museums relevant historical items, including documents, letters, and photos that capture the experiences of Italians in Canada.

In small as well as large settings, the dedication of archivists to disciplinary standards and to creating online national resources expresses the essence of professional commitment. As this Report is being prepared, we learn of the ground-breaking ceremony for the new Stratford-Perth Archives, a 10,000 square foot purpose-built facility which, in the words of archivist Betty-Jo Belton:

[It] will include a state-of-the-art records storage room for the collection to grow over the next 20 years, plus a well-equipped and fully accessible public reading room, a gallery space to show off the treasures of the collection, welcome school groups, and host speakers on local history; staff will have access to preservation and digitization labs to protect the collection and make it readily available to online researchers.

Here, in Stratford Ontario, is the enactment of the prevailing *and* evolving importance of the backbone principles of contemporary archival science, which Couture outlines succinctly:

Archival science is definitely endowed with principles governing the scientific procedures of the archivist. The principle of respect of fonds, the principle of territoriality, the life cycle of archives, the connection between activities and creation of archives, the essential character

Let us remember, however, that re-examining is not rejecting, revisiting is not demolishing.

of intervention at the outset, these are the theoretical foundations that provide a backbone to contemporary archival studies. Is it useful to insist on the fact that it is essential to revisit these fundamental principles frequently to mature, enrich, and improve them? Let us remember, however, that re-examining is not rejecting, revisiting is not demolishing. To be blunt, let us understand the difference between evolution and revolution.

Couture acknowledges the principle of territoriality evident in the 10 regional archival centres and 36 associated private archives in Québec.

The principle of territoriality, which asks that we make every effort possible to leave archives in the location where they originated, is another basis that strongly characterizes archival studies. The application of this principle allows a better response to the needs of the researcher since the connection between the fonds and their creators is thus more assured. In Québec, for example, this principle led to the creation of a network consisting of more than 40 archive centres, both the 10 regional archives of BANQ and the 36 associated private archive centres.

The archive centres are located in Abitibi-Témiscamingue et Nord du Québec, Bas Saint-Laurent et la Gaspésie-Îles de la Madeleine, la Côte Nord, l'Estrie, Gaspé, la Mauricie et Centre du Québec, Montréal, l'Outaouais, Québec, and Saguenay-Lac-Saint-Jean.

At every turn in current archival literature and within the submissions we received the renewed social importance and collective responsibility of archives were major topics. The diverse archival spaces in independent community archives are treasure troves, not only for the communities themselves, but for Canada as a whole: the stories of our country since 1867 will not be told properly without their inclusion. As the *ACA Aboriginal Archives Guide* (2007) states, "Preserving archival records for future generations supports the community in fulfilling its responsibilities, not only in basic self-government but also in protecting and fostering its language, traditional knowledge, and other cultural heritage." Other community archives too focus on future users as they collect current material. For example, the Canadian Lesbian and Gay Archives (CLGA) in Toronto – the largest LGBTQ+ archive in the world – finds its *raison d'être* in transmitting to

The diverse archival spaces in independent community archives are treasure troves.

younger people stories and texts from the struggle of homosexual, bisexual, and transgendered individuals.

L'Association des archivistes du Québec (AAQ) reminds us that every activity in the archives – research for a publication, a physical or virtual exhibit, a film, a historical novel, a television series, a web production, a doctoral or master's thesis, a genealogical search – benefits the whole population to whom, in a sense, the results of these explorations are addressed and for whom they constitute a genuine service. Shelley Sweeney, Head of the University of Manitoba Archives & Special Collections, declares:

Archival records are critically important to individuals and to society in general. They are the basis for individual and societal human rights, provide transparency of action and accountability for governments, and support enriching cultural activities that basically make life worth living, such as the creation of films and documentaries, the writing of books and histories, and the tracing of personal family genealogies.

Prominent, too, are awards for archival excellence. One noteworthy example is the Manitoba Day Award presented yearly by the *Association for Manitoba Archives* (AMA) to recognize those users of archives who have completed an original work that enhances the archival community and contributes to the understanding and celebration of Manitoba history. These works can be fiction or non-fiction and can be in a variety of media, including audio and film. In 2014 there were 13 recipients, among them Carol Matas for her book *Pieces of the Past: The Holocaust Diary of Rose Rabinowitz*, for which the author used Rose's diary in the archives of the Freeman Family Holocaust Education Centre in Winnipeg.

Recommendations

THE PANEL RECOMMENDS THAT:

26. provincial and territorial ministries responsible for libraries and archives develop programs of financial aid that will allow communities to take charge of the preservation, treatment, and availability of archives and other components of their documentary heritage, thus ensuring the

necessary integration between archives and the communities where they were created.

27. provincial and territorial governments, recognizing that small communities rarely have sufficient budgets to equip themselves with permanent resources for the preservation of their documentary heritage, put in place means that allow these small communities to profit from professional expertise in archival science and especially in the domain of digital archives.



Consider these two vignettes about the potential archives *in* communities can afford; the first is Gerald McMaster's "personal story" and the second is a composite fictionalized portrait.

As a curator in three museums my job was to carefully collect works for art based on a set of considerations. In one museum I recall the vast amounts of material being donated quickly became a storage problem; in another institution the director advised us all to be ruthless in turning away material, otherwise we too would have storage and other problems.

A number of years ago my older brother completed a genealogy of our family. Because he was able to conduct this with relative though painstaking ease, my thought is that most, if not all, Indigenous families would be able to conduct a similar exercise. The kicker is, however, that most historical records extant for Indigenous peoples are government records that date to the late nineteenth century. But it is of course the many nuanced stories that arise from family investigation that are not contained in genealogical records, but available only through personal inquiry. Furthermore, virtually every family member has family photographs, which are often non-professional; nonetheless, they are a historical record. In a few instances there is an existing historical document from the nineteenth century, for example there is an official government document sent to a family member. A family heirloom such as a feathered headdress and associated photographs of various family members wearing it makes our family history come alive. Combining all this material would result in a fascinating story, as

well as an equally captivating exhibition, filled with living voices of the present.

This got me thinking that the amount of personal material in private homes across the country has to be staggering. Despite our local or national archives being called the “nation’s attic,” I would presume that they wouldn’t want to be overwhelmed by storing everyone’s material. It behooves libraries and archive then to work with Canadians in various ways by helping them create private archives. If there are genealogical programs available can living voices be harnessed in other ways? With self-publication programs readily available can library and archives kick start potential users?

The following sketch of MaryAnn outlines both the resourcefulness and the frustrations of a determined family historian.

MaryAnn

MaryAnn, in her forties, is a family historian and album maker. She uses libraries and archives to find records created by public and private institutions that contain information on family members, their education, occupations, places, churches - anything that helps in reconstructing their lives, memories, and stories. For years, she spent every lunch hour and every Saturday with these sources. She also worked in consultation with other people in genealogical interest groups where together they developed expertise about records. In her research, many copies of public records became recontextualized as her private records, then again made public by adding them to her website and Facebook page. Her family histories are also about reconnecting with local pasts, and reconstructing national, ethnic, and religious identities. Technology has changed her work, while shifting her expertise to knowing about electronic databases, and social media. The Internet especially “helps to find or push you in another direction to make you think about what to look for” (Tucker 158).

MaryAnn has been a genealogy activist too: in 2002 she joined the members of the Alberta Family Histories Societies in their legal action against the federal government to release all post-1901 censuses.

They finally won in 2005 when the 1911 census went online at Library and Archives Canada's website. She has mixed feelings about the 1921 census, which is only available from Ancestry.ca (based in Utah). As a "registered guest" she has access to the census, using the impressive search functionality of Ancestry.ca, leading her to the reproduction of the census and to the right page. Having noticed that the Source Information acknowledges that the original data are held by LAC, MaryAnn worries about this seeming commercialization of the Canadian people's records. The images of the census are available for free, but only to Canadian residents and only on the Ancestry.ca website. In 2013 LAC has also signed a 10-year agreement with Canadiana.org (not a commercial venture, an initiative of the Canadian Association of Research Libraries) for the digitization, indexing, and description of millions of personal, administrative, and government documents, as well as land grants, war diaries, and photographs. There will be no charge for those Canadians who wish to access these collections at LAC or in one of subscribing libraries in regions across Canada. But to conduct advanced searches without leaving home, one has to pay a monthly fee. That fee will come on top of what MaryAnn is already paying to Ancestry.ca. To get access to other records (and more services) via Ancestry.ca she had to take out a "Canada Deluxe membership" for \$119 per annum. Access to all Ancestry.com records from the UK, Ireland, the US and more would entail taking out a World Deluxe membership at \$200 per annum. Of course, these costs are substantially less than MaryAnn would incur travelling across Canada in order to access the materials of interest.

All the digital and digitized data are very cool, yet Ancestry's website, like the LAC website, yields only basic genealogical information, the spine of a family history. But MaryAnn is interested in the whole body of historical information that constitutes her family history. Some of this is offered by resources such as CanadaGenWeb.org. Each of its regional GenWebs links to digital copies of local histories, book indexes, maps, photos, digitized newspapers, and other records. Since MaryAnn's family members moved around Canada, she has to search several of the regional websites, each slightly different. Moreover, none of these help MaryAnn in her research discovering some of the

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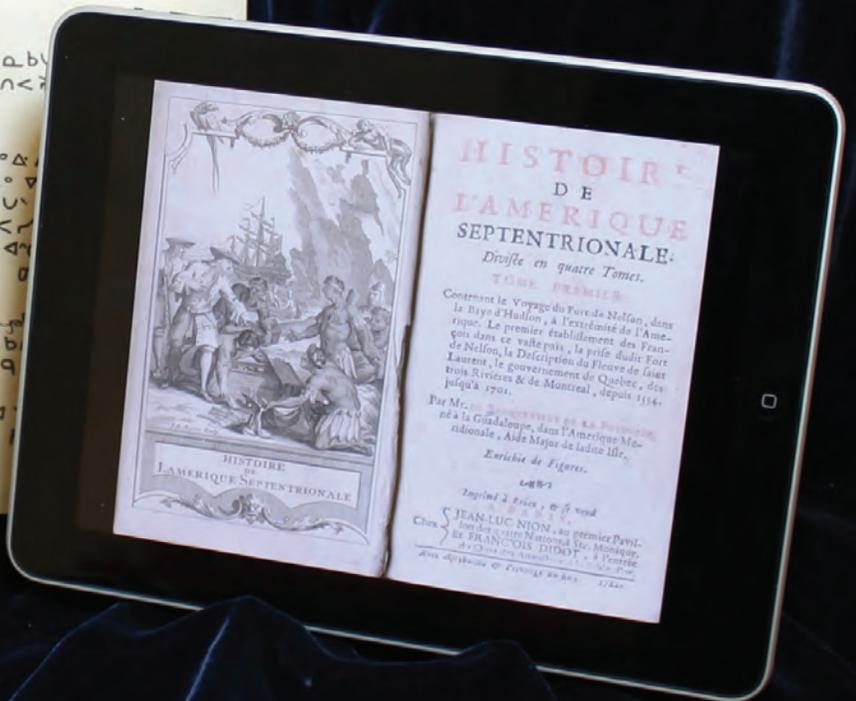
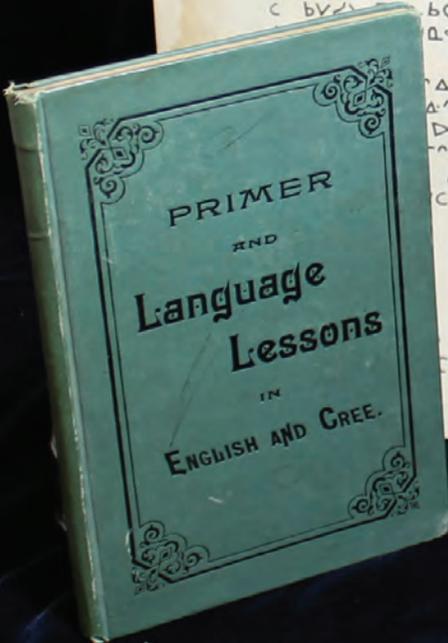
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JEFF PAPINEAU

Bruce Peel Special
Collections Library,
University of Alberta

artefacts that played a role in her family's lives, like dresses, samplers, farmer's tools, kitchenware, and other museum objects. Yes, she searched the Artefacts Canada database, but that does not cover the objects, school records, and other memorabilia kept in Elnora AB (pop. 320) by the local museum or the veteran's photos exhibited at the Royal Canadian Legion branch.

G. Academic Libraries

● I. ANALOGUE CULTURAL PATRIMONY

Libraries and archives face the challenge of growing electronic collections and large analogue collections. Contrary to the mythology that "everything is available on the Internet," there is still a vast amount of unique or valuable information that is only available in the original paper form. By widely accepted estimate only 1-2% of Canada's documentary heritage is digital. Thus libraries and archives must offer access and stewardship for both digital and print collections. It is not one or the other – it is both. This is costly but necessary; it may be a transition stage or permanent, but it cannot be avoided at present.

Paperless libraries or archives are as mythic as the paperless office. Academic libraries and public archives will continue to care for hybrid (paper and digital) collections, both those dating from the past (legacy) and new acquisitions. In many public libraries the emphasis will shift from paper to ebooks and virtual collections. But this will not lead to the disappearance of paper books, just as the printing press did not banish manuscript or oral cultures. In a UK study about the library of the future, 66% of 9 to 17-year olds agreed with the statement "I'll always want to read books printed on paper even though there are e-books available." The same study found that the development of e-publishing is leading to an increase in the size of the publishing market rather than replacing paper publishing.

The submission of the *Canadian Association of Law Libraries* (CALL) exposed the erroneous beliefs "that electronic formats are equivalent or better than print and that electronic information resources can somehow be managed by themselves or by IT experts." A general notion among stakeholders, their submission noted, is "that all information is available online for free, and accordingly, paper resources are not necessary." Moreover, reiterated the *Saskatchewan Archives Board*, people accessing libraries and archives in person or virtually "rarely stop to think where the record comes from, why it exists in the first

Libraries and archives must offer access and stewardship for both digital and print collections.

place, or why it is important that this documentary evidence continues to exist into the future.”

Many academic librarians across the country who work in the area of Information Literacy, an enhanced type of programming that previously was termed Bibliographic Instruction, and who have provided such programming to several generations of post-secondary students, today claim that the students entering our institutions are ill-equipped to deal with the complexities of information discovery, retrieval, and usage in the modern academic library. In part they fault the secondary schools’ and colleges’ lacunae in programming. This may be true – in part – as is dealt with elsewhere in this Report. However, the library environment of Canada’s 332 academic libraries, with their 686 branch outlets, is in itself markedly different today than it was 15 or 20 years ago. And even though the entering students are more technologically savvy than were their predecessors, they also require a more sophisticated skill set than was previously necessary in order to navigate the sophisticated information and knowledge resources required to succeed in the academic enterprise. Their searching experience as first-year students tends to be a product of a Google or in fewer instances the Google Scholar experience. They have little or no grasp of the breadth and depth of the information and scholarly communication environments as they exist and relate to their individual program of study.

Post-secondary libraries comprise various types and each is adapted to support the courses, programs, and credentialing requirements of their host institutions. This spectrum of types begins with the vocational institutes and the two-year community colleges (including the Québec-based Cégep) as well as institutes of technology, and continues with the degree-granting institutions such as baccalaureate-level universities (including university-colleges) and research-intensive universities. Quite frequently this range of libraries is characterized simply as academic. While there are similarities of purpose and some programming, simplistic characterization masks the substantial differences that are the reality between the types of institutions on the continuum.

At one end of the range are the libraries entirely mandated to support the teaching and learning curricula of their host institutions. Collections reflect programs and have some focus on textbooks and required readings. These collections are not extensive; however, they do secondarily contribute over time to the patrimony of the country as specialized print resources for particular programs are preserved in local or regional print repositories. Full-text databases acquired

through independent licenses or via local or regional consortia have changed the learning support models of these institutions. Nevertheless, librarians from these institutions often claim that their too-small budget does not allow them to provide their teachers and students with the digital resources they need. Even so, their services to students are highly personalized, with strong literacy programs and remedial assistance if required to improve other competencies.

Baccalaureate-level institutions (including many that have limited or specialized graduate programs) build collections not only to support instruction, but also to some extent to support research interests of faculty who are expected to research and publish. Again, general print collections are not likely to contribute substantially to the Canadian patrimony, but many of these university libraries have modest rare book and special collection areas with materials of some note. The capacity of these libraries to support their own programs and faculty research has been enhanced exponentially by participation in regional and national consortial site-licensing programs for ebooks and e-journals. For example, all members of OCUL – large and small – boast in excess of 32 million articles available through Scholars Portal. Many of these institutions are a cohort within the 75 CKRN members. Like research-intensive universities, the dominance of electronic resources at modest cost in baccalaureate-level institutions, and thus approximating that found in the largest research libraries, has allowed and required library services to be reinvented.

Within the academic sector, Canadian libraries in research-intensive universities have undergone the most change in the past twenty years. Massive adjustments have been required in response to transformations during this period. Many of the responses to the changes have been enabled by CARL, which has originated numerous initiatives that have brought about collection development and service program changes to the system. For example:

- CARL and various CARL institutions led the Data Liberation Initiative (DLI) and the establishment of Research Data Centers;
- CARL established the Alouette Canada portal and then initiated the merger of Alouette Canada with the earlier 1979 CARL initiative, the Canadian Institute for Historical Microreproductions (CIHM), thus creating *Canadiana.org* – a Canadian mass digitization infrastructure;
- and finally, by way of the Canadian National Site Licensing Project (CNSLP), which was a trial project to assess the feasibility of national database site licensing, the *Canadian Research Knowledge Network* (CRKN) was established.

We heard repeated concerns from academics that the preoccupation with the digital was having a harmful impact on the more traditional collecting of print materials and that reliance on the Internet was lessening humanistic engagement with non-digital material.

CARL has also been key in fostering Open Access (OA) within the Canadian context, and several CARL members have been actively working with academic monograph and journal publishers to test OA models. Similarly new collection formats are assuming greater importance. The curating and preserving of research data are an arena of enterprise for many university libraries as the potential of data intensive research becomes increasingly realized.

Whether small or large, whether baccalaureate or graduate level, Canadian libraries currently struggle with these issues: adequate space (both quality and quantity) as enrolment numbers increase and as collections grow; the dichotomy between personalized service and self-service within the context of enabling technologies; the future of information management systems; the development of their professional and support staff cohorts to meet new challenges and to embrace and manage change; and forging new roles for professional librarians and introducing new competencies beyond or replacing those of the traditional academic librarian.

Indeed, there is much with which these libraries must contend, but we are confident, appreciating their past endeavour, that the library leaders and the dedicated librarians on staff have the will and the energy to respond proactively. We are concerned, however, about one specific challenge, the preservation of the national analogue, paper-based patrimony. With so much of the current focus on the creation, organization, and preservation of digital assets, we fear that our analogue paper-based patrimony is at risk. We heard repeated concerns from academics that the preoccupation with the digital was having a harmful impact on the more traditional collecting of print materials and that reliance on the Internet was lessening humanistic engagement with non-digital material. This urgency was expressed to us in a number of briefs, but perhaps best articulated by the *Royal Nova Scotia Historical Society's* statement that "the actual and potential loss of historical evidence is immense and of considerable concern to present day historians who worry that future generations will be severely limited in appreciating their heritage." Alexandra Hook of Aurora College in Yellowknife, Northwest Territories, best voiced another common theme, applauding the expansion of the "collective responsibility to embrace digitized and born-digital forms of the historical record . . . [but hoping] . . . that it will be in addition to, and not at the expense of, the continuing preservation, authenticity and availability of the primary source."

The stewardship of this Canadian analogue cultural patrimony is a shared responsibility between both library and archival institutions. The 800 or more

archives in Canada play a major role in the preservation of the national memory. Their collections, unique by definition, held in repositories varied in their capacities and disparate in their locations, nonetheless have equal obligation to maintain the trust conferred by Canadians.

On the library side, the general collections of the 29 CARL research libraries comprise the majority of the Canadian national print patrimony, which includes a significant percentage of the global patrimony (not limited to Canadiana, that is, works by Canadians, about Canada, or produced in Canada). It is a testament to present and past librarians that such substantive and complementary collections have been created within a distributed environment with no significant coordination. The preservation of the documentary patrimony is an honour shared with CULC member institutions, with focus usually on their local history collections, and with certain provincial libraries as well as with federal departmental libraries. It is shared with the National Science Library (NSL), previously the National Research Council-Canada Institute for Scientific and Technical Information (NRC-CISTI) and now a component of the National Research Council-Knowledge Management (NRC-KM); and it is shared with LAC and BAnQ. LAC and BAnQ are special cases and have mandates that solely focus on the preservation of the cultural and heritage patrimony.

Within this context CARL research collections include in excess of 66 million monographs, to say nothing about pamphlets and grey literature as well as back-runs of historically important newspapers, magazines and serials, and other dissemination media (microforms, film, videos, etc.) that represent unique and irreplaceable content. The nation's rare and unique books, and its numerous and diverse special collections, the latter composed of print, manuscript and media material, are held in these collections. As noted by CARL President Gerald Beasley, libraries, their host institutions, and their funding authorities "must be willing to make investments in infrastructure – both physical and digital – to ensure that last copies, rare material, research data, and all manner of other materials easily lost to history are going to be preserved." We learned that several Canadian libraries have been developing infrastructure to deal with what has become known as the "last copy" issue. High density storage capacity has been, or is being developed by the University of British Columbia, the University of Alberta, the University of Toronto, and the tri-university initiative, TUG, which is a partnership of the University of Guelph, Wilfrid Laurier University, and the University of Waterloo.

Provincial and federal libraries also have a responsibility. Almost without exception their holdings, in whole or in part, are worthy of preservation. At the

provincial level these holdings would include ministry/departmental libraries, and most certainly would include the collections of provincial and legislative libraries where they exist. These libraries have a history of collection building including acquiring the printed record of their hosts (that is where mandates included the collection of provincial publications, newspapers, and other jurisdictional specific materials), and they similarly seek to preserve the documentary legacy of the provincial jurisdiction. The Brief from the *Association of Parliamentary Libraries in Canada* (APLIC) repeatedly underscored the need for the preservation of “unique” legacies, some collections “with materials predating Confederation”; they lamented the LAC decision “to cease collecting provincial and territorial government publication.” Nonetheless, they remain resolved that LAC “provide leadership for the profession, to preserve and maintain government publications collections, . . . to establish standards, and to provide a national union catalogue.” Within this context we also include BAnQ, an institution asserting a national persona as pertaining to the province of Québec; BAnQ’s mandate is to collect, preserve on a permanent basis, and disseminate all published heritage of Québec and all materials related to this heritage and of cultural interest as well as all materials related to Québec published outside Québec. Budget constraint in most provinces has seen the contraction or elimination of these libraries and has augmented concern as to the disposition of materials worthy of salvage.

We heard many voices, from within and outside of the federal bureaucracy, concerning the announcements of numerous federal ministry/departmental library closures, site consolidations, program eliminations, and mandate changes that negatively affected services to government and academic researchers alike, and also put in jeopardy the unique collections held in these libraries. Media reports and some federal researchers commented passionately on the closure of numerous libraries including Citizenship and Immigration, Human Resources and Skills Development, National Capital Commission, Public Works and Government Services, and Transportation, Infrastructure and Communities. In addition, consolidations eliminated regional services and collections, such as Parks Canada, Fisheries and Oceans, Natural Resources, and Health Canada (whose collections were moved to the Canada Institute for Scientific and Technical Information). Internal departmental transfers of library or information centers have also contributed to the agitation. These changes occurred with little public notice, and as such there was little opportunity for determining alternatives or devising remedial processes. In some cases university libraries were able to triage some print materials. However, anecdote suggests valuable materials might have been

destroyed or lost. It is still unclear exactly how all these changes happened and how negative was their impact. A resolution is required.

Finally there is the role of NRC-KM. Its mandate, defined for NRC-CISTI but continuing today as the *de facto* National Science Library, is embedded in the National Research Council Act. The designation as a Library of Medicine was added in the 1970s at the request of the *Association of Faculties of Medicine of Canada*. When the NRC-CISTI budget was reduced dramatically in 2010, there were consequences. However, sensitive to this mandate and the elements of the historic patrimony that were in its custody and control, and by way of enlightened vision bolstered by consultation, NRC-CISTI found opportunity in restraint. Working with other federal agencies, the private sector, cognate organizations in the public sector such as Research Data Canada, and with the CARL libraries, NRC-CISTI found ways and means to enable its services to be continuously relevant and innovative, and to ensure elements of its collections were safeguarded. For this it received approbation from the community.

Recommendations

THE PANEL RECOMMENDS THAT:

28. the Librarian and Archivist of Canada create a pan-Canadian committee of peers, consisting of appropriate stakeholder leadership from the library community, such as, but not limited to, CARL, CULC, NRC-KM, and APLIC, to discuss the standards and protocols that would underpin a network of regional preservation/storage facilities for both print and digital materials.
29. libraries work collaboratively in developing shared print collections. To pursue this end, it is recommended that Provosts of the U15 Canadian Research Universities establish and seek sustainable resourcing for three to five regional preservation/ storage facilities as last copy repositories, open to all repositories, to ensure the preservation of the entirety of the Canadian analogue heritage patrimony.
30. the Auditor-General of Canada (AGC), who has oversight accountability for the well-being of the Canadian patrimony as a legacy to future generations of Canadians, review the decisions made with regard to the actions taken relating to federal departmental libraries, and conduct

a cost/benefit analysis of the decisions, the process undertaken to operationalize the decisions, the expected efficacy of the outcomes, and assess whether there was understanding that the national patrimony required consideration in the decision and the implementation process.

● II. STRATEGIES FOR BUILDING DIGITAL SPACES

The fundamental shift in procedures and outlook initiated by the digital shift is a consistent and pressing topic among librarians and archivists. New thinking conceptualizes space and its purposes differently. Archives and libraries are inventing new forms of communication, both on-site and on the web. Being digital and being digital in conjunction with partner- institutions clearly enable libraries and archives to serve users better, attract more users, and prosper in the battle of the fittest. Social media, mobility, connectivity, multimedia, e-business – these and more define the social and cultural ecology of which archives and libraries are a part. But the ecology has to be sustainable, with enduring access to born-digital and digitized documents and books. As the UK Joint Information Systems Committee (JISC) study on Digital Preservation Policies concludes, “any long-term access and future benefit may be heavily dependent on digital preservation strategies being in place and underpinned by relevant policy and procedures.” The challenges of built and digital space and the accommodation of user expectations in libraries, which the following discussion explores, apply with equal emphasis to the condition and perception of archives.

Social media, mobility, connectivity, multimedia, e-business – these and more define the social and cultural ecology of which archives and libraries are a part.

Public libraries are extending their roles as community hubs to become key urban public spaces and access points for technology. University libraries are reducing on-site space for books in order to free up floor space for highly-used study and collaboration areas. In both cases the physical shared space is becoming an even more important part of library services. In contrast, research and other special libraries, particularly in the private sector, are seeing heavy use of their online resources but much less demand on physical space. Patron needs for service on desktop computers and mobile devices are putting pressure on the capacity to deliver services entirely online.

Physical library space is being rearranged. In addition, major new libraries are being built in Canada and worldwide, incorporating new perspectives on library priorities. In Canada, examples include new public libraries in Halifax (2014), the Taylor Family Digital Library in Calgary (2011), which is a physical space despite its

name, and new university libraries at Mount Royal University in Calgary and at the Canadian Mennonite University in Winnipeg.

The twenty-first century has signalled a period of enormous change for libraries in which the portion of acquisition budgets allocated to digital resources has continued to increase. In 2007 Québec's public libraries spent \$62,126 for digital books; the same budget line in 2012 showed a figure of \$705,978, an increase of 1136%. These figures, relatively low compared to the rest of Canada, can be explained by the much lower number of digital titles offered in French compared to that offered in English. To illustrate, the number of digital titles in all public libraries in Canada is 912,017; for Québec libraries it is 148,358. In 2012-2013 the 75 university libraries belonging to the *Canadian Research Knowledge Network* (CRKN) collectively spent \$92.1 million on the acquisition of digital publications, mainly journals.

These figures relating to collections budgets as well as the practices and digital needs identified by library users show that a true revolution is underway. But its effects, technological or political, are neither universal nor instantaneous. Although the transformation has been ongoing over a relatively long period (20 to 30 years perhaps), some librarians and archivists resistant to change have modified services only superficially. This position is dangerous and can cause the erosion of both the library and archival professions and their documentary institutions. The digital revolution is not simply a change of style. It constitutes a paradigm shift that requires the review and transformation of all functions and services in all types of libraries.

This transformation is occurring in three principal areas of library activities: collections, services, and buildings. The following section concerns elements of the architecture and design-built space of libraries that are linked to the introduction of technological programs. It underscores the necessity of developing strategies to integrate digital culture into the built spaces of libraries.

Library Collections and Built Spaces: The Printed Word

THE PRINTED WORD used to be the first consideration in library construction or major renovation projects. Today, however, the design of public spaces determines the available space for collections. The printed word still plays an important role. In the humanities and social sciences, the essential corpus of print collections has not

yet been digitized. Yet it is a completely different situation for other disciplines, as noted by the *Council of Atlantic University Libraries* (CAUL):

We don't need the paper any longer but we do need the space for community and collegium. While virtual space can be effective, we still need to meet in person to build relationships, generate ideas, foster effective collaborative learning, and to share our expertise and skills. Libraries by whatever name we give them in future should be that space both for the public in general and for the informed citizen. (Karen Keiller, CAUL)

Major projects for reconfiguring collection space have been developed in more and more university libraries and public libraries. In each case, the space required for print collections is evaluated in conjunction with the space required for service to users and the community, within the maximum space achievable for the library's new missions. These exercises are not carried out lightly. It is well known that librarians do not like to remove books from collections comprising a common good for their users and accumulated over decades by previous generations of librarians. However, it is their professional responsibility to ensure good management of public resources and to respond in the best way possible to the needs of their users, all the while respecting the budgets allocated to them. Best practices, as well as a good understanding of needs derived from efficient consultations with the community to be served, lead librarians to propose new services.

Physical collections of journals and magazines continue to shrink substantially and the number of book acquisitions is arguably slowing with electronic versions being available for access to a larger audience.

Space is a premium on many university and college campuses and libraries commonly occupy large buildings. Physical collections of journals and magazines continue to shrink substantially and the number of book acquisitions is arguably slowing with electronic versions being available for access to a larger audience. In libraries, weeding, consolidation of physical collections (e.g. paper, microform) with nearby institutions, and relocating targeted sections of collections to high-density repositories (on or off campus) are growing trends. Due to these cost-saving measures, the reduction of hard copy materials is freeing up space. Many libraries have re-purposed floor space to accommodate more group study rooms, computer labs, maker spaces, learning commons, and lounges. (Robert Thomas, U of Regina, SK)

The evaluation of collections, their reorganization, and deselection operations entail large projects for librarian teams. Decisions as to which titles to retain locally, to send to storage, to place in a library network, or to deselect are based on different criteria, principally the following:

1. Does the library possess a second copy of this title?
2. Does the library possess earlier editions that are not necessary to retain?
3. If it is judged that the digital version of the title is sufficient, does the library possess a digital version whose access is guaranteed in perpetuity?
4. Does another library in the area have a copy of the title in its collection to provide on InterLibrary loan?
5. Is it still useful to retain this work? In other words, does this title fit within the criteria identified within the policy for development of the library's collections?

While the first four criteria are usually taken care of by librarians themselves, the fifth is usually answered in consultation with the library's users. The fourth criterion also involves a high degree of collaboration at regional, provincial, and national levels. Several library networks, within Canada and beyond our borders, are working together to develop shared print collections. These collections are either divided up among different libraries or a common warehouse is created where a consortium of universities or librarians handle the property and management. Care is taken to retain one or two copies of titles to keep in common. The success of these necessary enterprises in ensuring good management of public funds as well as good management of multiple collections of print works in Canadian libraries implies a high level of collaboration and cooperation. The establishment of shared print collections is an answer to the reduction of number of loans, particularly in academic libraries.

Library Collections and Built Spaces: The Digital

THE DIGITAL IS A SPACE in and of itself. Users have been nearly unanimous in expressing their difficulties with using systems developed for or by libraries. Several projects are underway to rethink digital collection interfaces for the access and exploration of online collections. There is a need to develop new ways to

Facing page:

Bibliothèque St-Laurent
Bibliothèque du Boisé
Québec

Digital infrastructures that would allow the intersection of collections from libraries, archives, and museums, would offer possibilities to explore questions in ways that are impossible today.

search and explore digital collections. The video game environment provides a potential example of such an approach to develop completely different types of interfaces. The search forms in which we enter keywords and linear lists of documents presented to us after we hit the “enter” key corresponds more to the print world. The list of search results that comes from print culture has significant limitations. Search and results interfaces based on relations and links between objects and documents, eventually in 3D as in video games, would open new possibilities of interactions and discoveries.

The more successfully readers can independently find responses to their individual needs, the more successfully librarians will have done their work. Thus digital infrastructures, sometimes called cyberinfrastructures, have to take into consideration the links readers are called upon to make in order to respond to their questions that often go well beyond the usual content types one finds in library collections. Digital infrastructures that would allow the intersection of collections from libraries, archives, and museums, would offer possibilities to explore questions in ways that are impossible today. We consider that a Canadian digital infrastructure that would give access, through innovative interfaces, to the collections of the three types of memory institutions (libraries, archives and museums) is part of what constitutes the future of libraries, archives, and museums.

Such projects present significant challenges, especially for small libraries and archives:

“Born-digital” material has many challenges for small libraries. First is to even know that it exists and then figuring how to access it. One has to determine whether it is of reasonable and reliable quality. There is the challenge of letting users know that it exists and helping them access it. Various video formats, digital picture formats, various sound file types, and the wide number of document formats will pose a large challenge to hold, catalogue, and make available to users in the future. (Lori Barr, Alice B. Donahue Library & Archives Board, AB)

One successful infrastructure project is Scholars Portal in Ontario, which has been discussed in the Library Consortia section of this Report. In Québec Bibliopresto is a not-for-profit organization with a mandate to develop and promote online services for Québec public libraries and their users. The members of its Board of Directors are directors of public libraries. Three major components are at the heart of their work: 1) negotiating and purchasing as a consortium for public libraries; 2)



MARIE D. MARTEL

establishing a collaborative online reference service linking Québec public libraries; and 3) administering, developing, and promoting pretnumerique.ca, the platform for digital book lending launched in 2011.

Prêt numérique was developed by DeMarque with support from the *Société de Développement des Entreprises Culturelles du Québec* (SODEC), which provides a platform for the selection and acquisition of digital books for libraries and library loans for their users. At this time the Prêt numérique platform is linked only with the warehouse of ANEL/DeMarque, the only one in Québec using a business model that allows libraries to make Québec's digital books available to their users. There are plans for other warehouses, both in Québec and internationally, where publishers will be able to make editorial lists available.

As well as services to libraries, the issue of the preservation and dissemination of research data and research records is becoming more critical. We received several submissions detailing the challenges in acquiring, archiving, and providing sustained access to this material.

The loss of digital records, through crashes and deletions, will likely leave society with a digital dark age, with many topics and issues lacking sufficient documentation to understand them fully. (Michael Gourlie, PAA, AB)

The principal challenges of born-digital materials for NEOS libraries are:

- supporting the ever increasing bandwidth requirements of digital material.
- obtaining licensing agreements that are affordable and workable in our different contexts and preserving access to government information. Government information is particularly susceptible to frequent change and removal from public websites. (Anne Carr-Wiggin, NEOS, AB)

Publications and all manner of grey literature have been stewarded and managed by libraries for many years. However, technology has enabled information to be generated at a scale and breadth that libraries have never before experienced. New areas of opportunity include the development of services to support data, both big and small, including structured and unstructured data. Other types of born-digital information need to be captured, curated, and otherwise accounted for, with possible intersections with libraries at all points of the information

lifecycle. The variety of information containers poses all manner of challenge as we consider discovery, access, description, management, and long-term stewardship of the materials. Robust infrastructure and new skillsets are required to appropriately manage digital items across this continuum. Issues involving copyright and sharing of information are becoming increasingly complex. Library resourcing must make difficult decisions around where to invest resources to support users of physical and digital materials, with the models for digital licensing and purchase still evolving. (Gerald Beasley, UAL, AB)

In the wake of these concerns, the *Leadership Council for Digital Infrastructure*, a voluntary group of leaders representing the principal stakeholders, seeks to create in Canada a complete worldwide advanced digital infrastructure ecosystem. Its members include representatives of universities, service providers, associations, and other organizations. Libraries are represented by the CRKN and CARL. The question of research records (data) is of particular importance for Canada's research libraries, which have begun *Project ARC* to coordinate activities and encourage the creation of infrastructure and services for the preservation and dissemination of research records and data.

For organizations with fewer library resources at their disposal, the challenges of digitization can appear insurmountable. Manon Dufresne, of Québec's *La Fédération des établissements d'enseignement privés* (FEEP), identifies these exigencies in her submission:

- the rapidity of the evolution of technology in document formats from which flow new technological needs that necessitate the updating of technical infrastructure (bandwidth, server) and
- the inaccessibility of loans of digital documents.

Members of the Panel have noticed the great disparity between means, expertise, and available access to digital tools and publications. On the one hand, schools give priority to establishing a minimal infrastructure and convincing publishers to offer students access to digital publications. On the other, universities are building on already robust infrastructure but are concerned with developing services and expertise for the cataloguing and management of the digital legacy as well as the continuing increases of journal and other digital material costs due to the oligopolistic practices of some journal publishers.

One clear and consistent message has emerged: the necessity of doing almost everything differently. The challenges libraries face require the maximization and capitalization of the significant resources (especially the human resources) they possess. Libraries must be transformed and create new services to respond to new needs indicated by their users.

Libraries' Built Spaces

SINCE THE INTRODUCTION OF THE INTERNET, libraries have prioritized the development of their digital collections. Initially, little changed in library spaces apart from the introduction of computers for library catalogue access. In the last five years, however, the development of technology programs inside the built space of libraries is becoming a priority. Librarians, with multidisciplinary teams, are designing and developing technological programs that provide a new vision of the digital so as to transform the experience of library users. Beasley observes:

As Libraries evolve they realize that library spaces must also change. Shifting collections focus to digital materials, as well as declining interest in more traditional physical materials (e.g. reference volumes), creates an opportunity for libraries to refocus their spaces back to people – creating engaging areas for collaboration, inspiration, and creativity. Both public and academic libraries continue to evolve their spaces to better welcome and service their communities, with hybrid areas comprised of new technologies and well-designed learning spaces.

Libraries continue to welcome their users to spaces shaped by the vision of the learning cathedral. Indeed, for many people, the library is still the only place that offers space for silence and reflection, suitable for both intellectual work and artistic creation. But over and above this fundamental mission, the library has become plural. It integrates space for collaborative work and friendly places for meetings, and discussion, as the CLA submission illustrates:

Libraries continue to be regarded as essential, relevant and vital public institutions. Now new forces are shaping library design and are drawing users back. These forces include the proliferation of new media, the integration of non-media-activities, expanded and convenient hours, the introduction of living-room customer-oriented conveniences.

These include coffee houses and digital labs, retail outlets, and the new view of libraries as economic generators as well as hubs of urban revitalization. (Marie DeYoung, CLA)

These new library spaces can encourage better connections among readers, information, and digital technologies.

It is important to minimize the disparity between what the digital world offers and the physical space of the library.

Until recently libraries were slower to adapt their spaces to digital technologies than they were to acquire and develop online collections. Since the mid-nineteenth century when the Sainte-Geneviève Library in Paris, designed by architect Henri Labrouste, allowed readers access to the stacks and to collections without using library personnel as intermediaries or go-betweens there has been little innovation in the design of library space or the provision of library services (Barbier 244-246). According to available budgets and the publishing market, the digital library offers an option that meets and anticipates readers' needs. On the other hand, recognizing the intellectual stimulation fostered by some of the large nineteenth-century reading rooms, the physical space of most Canadian libraries reflects print culture, taking very little account of the digital reality.

It is important to minimize the disparity between what the digital world offers and the physical space of the library. This objective is central to the redefinition project of libraries. In the digital world, the library space retains its definition as a community space, where users have access to print materials, but also, to services, equipment, hardware, and software. The library becomes one of the spaces where users enter on the ground floor of digital culture and the digital world. Designing technological programs contributes to the transformation of user experience and the definition of a new generation of libraries. At this point, few libraries have truly carried out a substantial transformation to the digital culture.

The type of library, the characteristics and needs of users, as well as the collections and the program of activities to be featured, are elements to be considered when defining technological programs for libraries. Furthermore, some widespread user behaviours, as well as the potential interest of translating certain library practices from print to digital culture, provide starting places for technological programs. Each time, users' needs provide the impetus for changes to be made. According to the type of library, these needs can be different. A university library director makes the following statement:

[M]ost undergraduate students spend long days on campus with no "fixed address" and turn to the libraries for spaces in which to study quietly, work with fellow students on group projects, and to

socialize, rest and reflect when they are not attending lectures, labs and seminars. UAL provides a variety of individual and group settings, both quiet and conversational floors, and a range of carrels, tables and soft seating to welcome students and accommodate their needs. (Gerald Beasley, UAL, AB)

Users Doing More

INCREASINGLY, library users (especially younger ones) prefer using automated services without library staff intervening in the borrowing process, or while using documents or library equipment. While the omnipresence of ATMs could explain some of this preference, the self-serve movement has been present in most libraries for a long time. Making collections available by allowing access to the stacks was a step in this direction. Self-check-out stations for books and reserve room course materials in university libraries, and self-service access to reserve books, are now standard features. Libraries might move even further by offering self-service loans of equipment such as laptop computers or tablets, opting for the installation of radiofrequency identification (RFID) scanning systems for management and circulation of collections, and providing an efficient room booking system or a way-finding system to orient users to library space. Libraries are spaces of freedom. The organization of space and services must be presented in such a way that the majority of users can locate and use whatever they need, without requiring assistance from library staff. This does not necessarily mean that libraries require fewer staff. They are using freed time to expand open hours, staff new buildings or services, and provide better support for technologies.

Making the Digital Library Visible Within the Built Space of the Library: Avoiding the Trompe-l'œil Trap

WHO HAS NOT BEEN STRUCK by an attractive book display in a bookstore or library? Many people cannot resist a display of book covers. Librarians are aware of the impact this showcasing has on the circulation of collections. The large sums invested in digital publications, as well as the importance of their development, surely justify asking how digital collections can be made visible within the built spaces of libraries.

We should not make the mistake of limiting the dissemination of digital collections to the web. This would make the library building a kind of trompe-l'œil or visual trick, as if the digital did not exist for the “traditional” library, as if the two components of the library (architectural space and digital space) could not enter into dialogue. The reality is just the opposite. These two spaces have the advantage of being able to answer each other, meet each other, intersect with each other, inspire each other – to be like the display of featured books, a fortuitous meeting between a book and its reader.

How does this visualization happen? Everything remains to be invented, created, and achieved. The answer is certainly not to cram oversized screens into library reading rooms and entrances. In a general way, it is a matter of putting the digital collections “onstage” in the library space. The expertise and achievements of museum curators are certainly sources of inspiration for rethinking self-service mediation in library spaces. Several ways can be imagined. Spaces for exploring digital collections could contain interactive devices using some form of touch-screen. Beyond the material composition of such interactive devices there would be interfaces featuring selected pieces from the collection. Like museum curators preparing an exhibition, librarians could select publications to feature according to an established program. Different types of devices could be created to correspond to the multiple genres of publications that make up a library’s digital collection. For example, reading the daily newspapers could take a completely different form from that offered for reading magazines or novels. The dailies could be presented by using a world-map, by city, and on a very large screen hung vertically, giving several readers the opportunity to consult or read articles in different newspapers at the same time. In a different way, the device for featuring novels might be featured in the form of a search tool for a tablet or personal computer that would reveal book covers, texts that one usually finds on the back cover, as well as selected excerpts. There could be library space (a passageway, for example) where audio books or recorded plays could be heard by passers-by, with displays identifying the work being heard. Or computers could be linked to acoustic speakers, allowing a selection of audio works (a playlist), not necessarily musical, and featuring period-specific programming.

The Library as a Place for Discovery and the Adoption of New Technologies

FOR MANY YEARS libraries have been going well beyond the core mission to establish, lend, and preserve book collections. In fact, libraries are centres for resources that are placed at the heart of a community to be shared by people who need them. In doing so, libraries are providing environments that allow members of the community to flourish on both intellectual and cultural levels. The book (whether manuscript, print, or digital) continues to hold an important place in these environments. Personal development and the full exercise of citizenship imply a level of skill in the comprehension of discourse as well as critical thinking. As well, the tools of digital culture are central to the new vocabulary used to express thoughts and ideas.

In addition to the lending of computers, tablets, and e-readers, we need to go further. For example, rooms can be made available for the exploration and adoption of new technologies, including library spaces where computer hardware and software are made available to users who may not be able to afford them. Financial barriers are real. At other times it is simply the lack of knowledge about these tools that presents an obstacle to adoption. The availability of technology for users fosters the creation of information and knowledge and constitutes a need librarians increasingly face:

There is a trend toward the library as a place of creation rather than consumption, and new technologies provide opportunities for libraries to play a role in the creation and preservation of local content. (Lisa Hardy, LAA, AB)

We need to deploy technology wisely and strategically to deliver maximum value in supporting the academic enterprise. User-driven technologies and tools are having a profound impact on the teaching mission of the university, and on the diversity of spaces and environments in which learning occurs today. (Horava and Weir, U of Ottawa)

Imagine making available equipment such as a 3D printer, a laser engraver, an on-demand printing press (e.g., the Espresso Book Machine), Raspberry Pi, Kinect cameras, various models of cell phones and tablets, Lego Mindstorms, a ThinkerKit by Arduino, or even specialized computers for activities like layouts, the creation of geographic maps, or editing audio files, animated images, and video. The immersion

The reality of library managers is that of the tight-rope walker who must also juggle decreasing budgets, constantly evolving technologies to be deployed in libraries, staff to train, redefinition of services to be provided, print and digital collections whose sustainability must be ensured, and digital infrastructure to design and build, in collaboration with partners on both national and international levels.

in a digital environment created by high definition projectors on several surfaces of the same room, or large screens and spaces for the viewing of data, could also be included in these imaginings. The objective of such spaces, which could be designated as a workshop for technological fabrication (known as a FabLabs or makerspaces) is to contribute to the democratisation of digital culture and to aptitudes, even entrepreneurship, which may not have otherwise blossomed.

In order make such discovery spaces functional, it is imperative that the services offered by the library provide appropriate intervention by well-trained and competent staff who will accompany, as needed, the users of these new spaces. Some library users prefer the DIY approach, but others need to be accompanied in their explorations. Redeployment of resources must take into account new needs and priorities identified by users and will present challenges to library managers.

There will need to be a balance of support and resources put toward the increasing popularity of the Library as place – the physical presence for community building and learning – with support for building the virtual Library and the demand for information and services offered online.

(Lynne Murphy, Novanet)

Besides budgetary considerations, decisions about which new competencies to develop and which new services to offer have to be made; they constitute the wager, sometimes a risky one, that librarians must make if they want to propel their institutions into the new digital culture. Thus the reality of library managers is that of the tight-rope walker who must also juggle decreasing budgets, constantly evolving technologies to be deployed in libraries, staff to train, redefinition of services to be provided, print and digital collections whose sustainability must be ensured, and digital infrastructure to design and build, in collaboration with partners on both national and international levels. Whoever said that being a librarian was a calm and peaceful career?

Recommendation

THE PANEL RECOMMENDS THAT:

31. libraries and archives work collaboratively on establishing shared digital infrastructure for acquiring, disseminating, and preserving digital content.

See also recommendations 28-30 above referring to analogue cultural patrimony.



We offer this sketch of a graduand to illustrate how the future physical and digital spaces of academic libraries might contribute to student success. Some of the program is already possible in Canadian academic libraries; other aspects are more speculative. It is worth noting how she transitions from being guided by librarians to discovering for herself.

Gabrielle

A university student, Gabrielle, has just finished the last exam of her Bachelor's degree in Industrial Relations. At the beginning of the first term, she remembers how impressed she was by the size of the university. Aside from a few friends and acquaintances from Cégep met by chance in the hallways, the university felt like a city within the city. A large banner inscribed with "Welcome to the Library" invited her in. In the welcoming area, Gabrielle found herself at a crossroads where library staff greeted her with a smile while introducing the services she would be able to enjoy during her degree. As it turned out, she used them often.

Gabrielle remembers the few exchanges via email, chat, and even text with her subject librarian that often saved her time when she needed it the most – during the day, in the evening and on the weekends. She had access to a fabulous collection of publications from the most prominent scientific publishing houses from a single and intuitive interface, providing at once the content to which Canadian libraries subscribe in its entirety. Although everything found there is peer-reviewed and respects the high standards of published research, the interface resembles the digital universe of video games. Not only is the information found there relevant and easy to identify, it is also an interesting experience allowing for the serendipitous discovery of publications. During a search, she was presented with images of artefacts and objects from museum collections as well as archive centres. The platform gave access to publications from scientific publishers as well as museum collections and archive centres throughout Canada. All these resources have been integrated to offer a convergence of access to the collections of all three types of

memory institutions. Gabrielle had never imagined she would have such comprehensive access. In addition, searching information through this platform offered many more advantages than a Google search. Gabrielle was happy to learn that she would use the same platform for her graduate studies in another university next year, since all Canadian libraries provide access to it.

During a class visit, her subject librarian explained how much these resources cost to the university and how libraries contribute to several projects to favour free access to search results. In fact, her university recently founded a university press providing free access to its published books as well as a targeted collection of textbooks for undergraduate programs. For Gabrielle's area of study, the majority of the related publications were only available in electronic formats. However, she sometimes had to refer to or read works only available in print. In some cases, she used the services of InterLibrary loans since the libraries in her province decided to share their print collections in order to reduce the number of print copies of the same item, and thereby allowing libraries to provide more study spaces. She cannot recall the number of hours spent in the library's study areas over the past three years. Often, she would opt for a reading room, literally the only place for her to study in complete silence. But she also benefited from collaborative spaces to prepare group work. A camera connected to the network as well as four speakers was also available in some of these rooms, which enabled Gabrielle to record practice presentations with her colleagues so they could watch and correct their performance. For her first presentation, a library staff member coached the students and gave them advice. It gave her confidence.

Although the large quiet study areas were often her first choice, Gabrielle also appreciated the multifunctional group workspace. The latter was open and colourful, housing different types of furniture and buzzing with activity. Gabrielle found it useful to use the available mobile white boards and thought it was interesting to read what other students had written on them. She could meet colleagues there for help or support, and could ask the assistants for help with mathematics, writing, or using Word or Excel.

The library had been the main place for Gabrielle to use relevant technologies throughout her academic career. Although she owns a laptop, a present from her parents, she found it heavy and feared it could get stolen. Therefore, she mainly used library computers or tablets. All the software needed was installed and she could use them either in the library, in class, or in cafés.

Besides computers and tablets, the library enabled her to discover other tools to engage in digital culture. Gabrielle visited the Sandbox lab where she created many objects using the 3D printer. She could also print a small book using the Espresso Book Machine and tried Google Glass to explore this new modality of the digital world. Eventually, what had the most impact on how she worked with new digital tools was her access to the Data Visualization room. With her colleagues she also used the room to develop a final project visualizing gigantic Excel files and spatial representation of data. Through this exercise she discovered links and elements of analysis she wouldn't have seen otherwise.

In the end, Gabrielle realizes the important role the library had throughout her undergraduate career. In addition to making her feel almost at home, the library services made all the difference. They turned out to be an added – and essential – value to her university program.

H. Public Libraries

THE WIDESPREAD CANADIAN PUBLIC LIBRARY MOVEMENT was born as a social response to the disruptive technologies of the Industrial Revolution. Mechanics' Institutes formed many of the early Canadian public libraries, allowing their members to share reading material and to learn new skills. As literacy increased, so did the demand for recreational reading material. Children's libraries were added with the birth of a robust children's publishing industry.

There were public library systems in some Canadian cities and towns by the early years of the twentieth century, but many were subscription libraries open only to those who could pay. Andrew Carnegie's gift to cities across the United States and the British Empire changed this dynamic. Carnegie insisted that any community receiving a gift from his foundation had to demonstrate support for a public library; provide a site; commit tax support; and ensure that the library would be free for all to use. These principles still resonate with Canadians.

Canadian public libraries have endured many radical changes over the past hundred years, and they have emerged stronger each time. During the Depression, they became the “people’s university,” a term coined by American adult educator Alvin Johnson in 1938. They became places where people could first explore personal computers without having to purchase them in the mid-eighties. They are now becoming places more dedicated to the concept of personal discovery than to “lending” materials.

Public libraries are unique community cultural institutions. Art Galleries, museums, and theatres all present cultural material that is themed and packaged with the hope that it will appeal to people in their communities. Public libraries offer their users the freedom to choose the ideas, thoughts, or literature they wish to explore. Users also receive support in following their own paths.

Public Libraries Today

IN THE CARNEGIE LIBRARY ERA, the priority was to acquire, store, maintain, and circulate the book collection. The physical collection determined each building’s layout. Utility, economy, and the need for a quiet reading room were the drivers of library design. Mid-twentieth century library building attempted to create more flexible spaces, but designs remained book-centric. Many library buildings from this period have required substantial renovation and refurbishment to accommodate new services, technology, and digital collections.

In the latest wave of building, new iconic facilities across Canada reflect the change in public expectations, the diversity of the population, the new technologies and multiple information formats to be accessed. As Shannon Mattern comments in *The New Downtown Library*, “through the design and construction of a new home, libraries reassess or reaffirm who they are, they reconsider what is central to their institutional identity and they reflect on how to assert their continued relevance in an era in which their obituary has already been written by a myopic few.” She notes that designs must now reflect and accommodate often competing values and activities, community groups and global information networks, born digital and book people, noisy and quiet activities. They must accommodate the past while anticipating the future.

Libraries have become important community hubs, cultural centers, community destinations, resources for self-directed life-long learning, and creative incubators. Beyond collections, they provide media, exhibition space, theatres,

Libraries have become important community hubs, cultural centers, community destinations, resources for self-directed life-long learning, and creative incubators.



Bibliothèque St-Laurent
Bibliothèque du Boisé
Québec

cafes, spaces for collaborative activities, makerspaces, a place for public events, spaces for teaching and tutoring, and genealogy and local history research areas.

The influence of bold new designs and concepts from Scandinavia, Northern Europe, and Asia is reflected in recent Central Library design. The Library of the Future “is not a temple for storage of books, but a public place of sharing and experiencing, it is a social platform for learning and meeting, offering myriads of ways to access knowledge, an open space between home and work” (schmidt hammer lassen architects, 2013). Libraries have proven themselves to be resilient and capable of transforming themselves to meet the needs of a changing society. The future cannot be entirely foreseen but for consultant Susan Kent, “the



VILLE DE MONTRÉAL, ARRONDISSEMENT ST-LAURENT

future library should be an institution on the edge, experimenting with the new, leading the user on the way into the possibilities and potential of technology and collaboration,” and for Rolf Hapel, the Director of Citizen Services and Libraries for the City of Aarhus, “the future library building must support many formats and platforms for human meeting, interaction and exchange, for thinking and contemplation, for learning and experience, for reading, dialogue and creation.”

Measuring Value

INCREASINGLY, public libraries are directed by funding bodies to demonstrate their value. They are asked to go beyond basic input/output statistics and prove that their programs and services create demonstrable outcomes that justify annual budget allocations. The submissions to the Panel overwhelmingly stressed the need for advocacy programs. This need emerges from the requirement to explain why libraries are necessary and even essential in the digital age. Robert Kaplan and David Norton famously asserted, “If you can’t measure it, you can’t manage it.” Although there is some truth in this statement, it can also lead to the false conclusion that if you cannot measure the library’s programs and services to demonstrate their value, they are not worthy of funding. But libraries are about much more than statistics.

The *Canadian Urban Libraries Council* (CULC) statistical data permit benchmarking and provide reliable information on the development of Canadian public libraries. Through Counting Opinions, the Metropolitan Libraries division of the *International Federation of Library Associations and Institutions* (IFLA) initiated a similar program to include data from its membership among large urban libraries. The issue is, as always, a concern that numbers alone can both mislead and cause institutions to focus on numbers instead of service. As an example, customer-placed holds mean that many customers only come to library buildings to pick up material they know is waiting for them. This service, which users love, can reduce the number of items a library system lends. Users browse less and take fewer “just in case” items.

Increasing interest in evidence-based librarianship combines the best available evidence with user preferences captured through anthropological studies and user surveys, as well as professional knowledge and experience, to determine programs, services, and the organization of libraries. At its simplest, evidence-based librarianship combines statistics and stories. Economic impact studies also help to demonstrate the value of libraries. TPL’s *So Much More: The Economic Impact of the Toronto Public Library on the City of Toronto* illustrated an economic impact

return on investment for every \$1.00 spent. Similarly, in order to establish the value of committing municipal funds for the construction of a new Central Library, the Halifax Public Libraries (HPL) through the Halifax Regional Municipality commissioned an economic impact study. The results found that the Central Library's construction would generate 422 jobs and contribute \$16,752,042 to total household income and \$40,605,371 to the provincial GDP. Post-construction, the library would employ 175 individuals, contribute \$7,702,345 to total household income, and \$11,102,394 to the total provincial GDP. The report additionally noted the library's legacy impacts, including contributing to a strong urban core, which is a key component of municipal economic development strategy, and will also create the infrastructure needed for developing a creative economy and revitalizing the surrounding business district.

Recommendations

THE PANEL RECOMMENDS THAT:

32. public libraries make their work visible by posting evidence-based studies and economic impact studies on library websites for the benefit of the entire library community.
33. public libraries continue to share statistical data freely with CULC and other similar organizations.
34. library associations and organizations undertake and publish research into common issues facing the public library community.

Community Connections

IN AN INCREASINGLY COMPLEX SOCIETY, public libraries have had to expand outreach efforts to address new issues, serve new communities, and meet new expectations. The *Working Together Project* funded by Human Resources Development Canada (HRDC) from 2004 to 2008 was pivotal in the implementation of community-led development services in public libraries. A joint project of the Vancouver, Regina, Toronto, Hamilton, and Halifax Public Libraries, the project explored social inclusion, considered methods of connecting with excluded and marginalized communities, and identified service barriers in order to create a new inclusive service model. Its *Community-led Libraries Toolkit* provided

a road map for all libraries. As the toolkit notes, “A community development approach encourages and promotes philosophies, strategies, and empathies that build and strengthen relationships between socially excluded community members and the Library. At the same time a community development approach contributes to the growth of responsive and relevant library services and models that focus on Library community connections.” The project has had lasting impact and application, helping libraries reach underserved populations and build community.

English Language Learning (ELL) programs in public libraries provide more than simple language learning for new immigrants. They create a sense of belonging, helping new Canadians settle into community life in Canada and help bridge cultural gaps in understanding. Demand for programs is soaring, as many communities report that an increasing percentage of the people in their municipalities were born outside Canada. Public library adult literacy upgrading programs, early literacy, and children’s reading programs help to address the alarmingly low levels of literacy reported in all parts of Canada; these programs have an intangible result in building self-confidence and self-esteem in learners as they find employment, pass GED requirements, or go on to higher education

Providing services to persons with disabilities is a fundamental requirement for public libraries. Assistive technology, touch screens, minimizing the numbers of doors and steps to navigate – all contribute to equity of access. Beyond the accessible building codes of the past, universal access design has been broadened and has become a guiding principle for new library construction. As defined by the architectural firm of schmidt hammer lassen, it means “tailoring the design to a broad range of cognitive, sensory and mobility capacities in order to create an inclusive environment that reflects the diversity of people within society and removes all unnecessary barriers.” The principles of equity, flexibility, simplicity, safety, and ease of use are respected.

Public libraries are becoming more cognizant of the need to reach out to Aboriginal communities. All members of society need to feel welcome in the public library and to see their cultures respected and reflected within facilities. Winnipeg Public Library (WPL) is a leader in this regard, while others are at varying stages of building connections and inspiring trust.

Clearly, the modern public library is more than just collections. The expectations and multiple service demands place pressure on shrinking budgets. They also have implications for the human resources required to deliver the service.

Recommendations

THE PANEL RECOMMENDS THAT:

35. faculties of library and information science include a course in community development to better prepare graduates to fulfill changing roles in public libraries and meet the needs of a diverse community.
36. public libraries regularly inventory their programs, services, policies, and physical spaces to detect and remove barriers.
37. public libraries engage in meaningful community consultations to ensure the relevance and inclusiveness of their institutions.
38. public libraries pursue and strengthen their collaborations with literacy councils to expand and improve their English Language Learning programs and services.

● I. DIVIDE BETWEEN SERVICES OFFERED BY CANADA'S URBAN AND RURAL PUBLIC LIBRARIES

Canadians told us about the importance of their local public libraries. Many Canadians cannot imagine life without them. We heard stories of new Canadians who state, with great emotion, that they could not have adjusted to Canadian society without the safety of library space, the warmth of library staff, and the depth of library services. We heard stories of Canadians who found jobs, left abusive relationships, embraced their sexuality, managed health conditions, found lost relatives, connected with creative literature, and explored ideas in public libraries. Public libraries represent everything that is good about society, helping to empower people in their personal discoveries and to enliven and enlighten lives.

Many of Canada's urban libraries are among the best in the world. The figures speak loudly. As we were preparing this Report in June, Edmonton Public Library (EPL) was named 2014 Library of the Year by *Library Journal* and Gale Cengage Learning. This is the highest honour that can be bestowed upon a North American library, and Edmonton is the first library outside the US to receive the award. A recent international study by the Heinrich-Heine- University, Düsseldorf ranked libraries systems serving large metropolitan areas around the entire world and rated the public library systems serving Montréal, Vancouver, and Toronto as among the best. Most of Canada's urban libraries are engaged in conversations

with their communities about the changing role of public libraries and the effects of technology on their services.

Yet urban libraries also face enormous difficulty. They struggle to provide traditional library services while implementing the technologically-driven ways that Canadians increasingly access ideas and information. Greg Buss, at the Richmond Public Library in British Columbia, says that every new library building in his community has to provide a living room, noisy space, and quiet space. Many urban libraries are becoming technology hubs, places with the best available technology so that students can collaborate and home workers can telework.

Many of Canada's rural libraries simply cannot make this transition or provide the necessary space. The gap between the services provided by large, urban Canadian public libraries and those offered by small, rural public library systems is growing. The Panel is concerned that many of Canada's rural public library boards may lose their ability to provide even minimal services. The reason is simple; books and other library material are migrating to the digital world and small, poorly funded rural libraries cannot, on their own, support either the technology or the cost of digital collections.

Public libraries are primarily funded by local municipalities, and urban public library systems are generally better funded, per capita, than Canada's rural library systems. Urban libraries serve dense populations. Their communities tend to have better access to technological infrastructure. Cities have ample bandwidth. Cities can access servers and software and technologically driven services that are not yet available in many small, rural communities. Urban library systems can build ebook collections to meet the varied needs of their customers to ensure that these collections are not quickly exhausted. People can easily access them, and they do.

Rural library systems have often struggled financially. When public libraries relied almost exclusively on the circulation of physical material as their core business, it was impossible for small, rural library systems to provide levels of service that matched those in the best urban libraries. Their collections were small and opening hours were limited. Technology is changing the services rural library systems can provide, and technology is making distance less of a factor in service provision. Ironically, technology is also making it harder for small library systems to meet the needs of their customers. The shift to technology-driven services is too often an impossible barrier for poorly funded rural library systems. Still, if a library system only provides books in print formats, it may find that fewer members of the community need its services.

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Trade book publishers are talking about producing more and more of their material only in ebook formats, particularly backlist titles, and ebook sales continue to climb. A March 2014 analysis of ebook sales in *Publishers Weekly* by Daisy Maryles states “This [ebook] is a format that went from 3% of U.S. book sales in 2009, to 17% in 2011, to 22.55% in 2012. Figures for 2013 are not yet available, but judging by the number of publishers who shared their 2013 e-book stats for this roundup, the sense is that the sales numbers will continue to rise even if there is a slowdown.” A recent report on the worldwide future of ebooks produced by PwC states in the executive summary that:

Publishers should view these technological advancements as opportunities to move established readers to ebooks, which can improve operating margins and reduce production costs while creating a new market for customers who are not frequent book buyers but might find ebooks with multimedia content attractive. If the book industry fails to establish the marketplace now, companies may find themselves playing catch-up later after losing sales and customers to newcomers.

At a Spring 2014 conference on books in Italy virtually all talk was, purportedly, of the future and of the impact of ebooks on the world of publishing (<http://projectebooks.wordpress.com>).

Distance education is increasingly dependent on electronic material to support classroom study. Publishers know that even when books are produced as physical products, print runs are smaller than in the previous decade and books that would normally be declared out-of-print are, instead, made available as ebooks. In other words, a public library that cannot provide ebooks to its users will soon fail to provide basic library services. The Panel believes that all public libraries must offer their users a reasonable mixture of services that provide physical material, such as books and DVDs, as well as services that provide virtual material, such as databases and ebooks.

Although ebooks can be downloaded through slow phone lines where no Internet is available and even though ebooks offer rural libraries the opportunity to make large distances and short open hours immaterial, too many rural libraries cannot take advantage of these positive aspects of new publishing realities. Canada’s small library systems cannot, on their own, afford ebook collections large enough to satisfy the varied tastes and future demands of their readers and few small Canadian library systems can implement or support needed technology.

The gulf between the services offered by large urban libraries and the services offered by small rural libraries will grow much wider unless small library systems abandon some local autonomy in order to create larger library systems for some technology-driven services.

For the brand name to have power and meaning, all Canadian public libraries must provide a mixture of physical and virtual services.

This argument — that library ebook collections are expensive to build — may seem illogical to members of the public who buy ebooks. After all, the ebooks they purchase are usually much less expensive than print books. The digital world, however, provides publishers with the ability to place electronic locks on their products and to create a differentiated market. Consumer ebooks come with limitations on the number of times they can be downloaded. Ebooks sold to public libraries come with more potential downloads (or no limitation on the number of downloads so long as any purchased item is not lent to more than one customer at a time). These relaxed restrictions entail a cost. One major publisher, as an example, charges public libraries 2.5 times the cost of the printed version of a book for each copy of an ebook that they buy. Their argument is that the ebook does not wear out.

The *Canadian Library Association* and the *American Library Association* both have initiatives aimed at conducting talks with publishers about their pricing models. The gulf between the services offered by large urban libraries and the services offered by small rural libraries will grow much wider unless small library systems abandon some local autonomy in order to create larger library systems for some technology-driven services. Publishers recognize this fact. They allow smaller library systems to form cooperatives for ebook purchases. One example is Overdrive, the ebook vendor with the most market penetration in Canadian public libraries; it offers Digital Rights Management (DRM) and associated digital media solutions for distribution of premium digital content over global networks. Many Canadian libraries are already working together. We have The *BC Libraries Cooperative* (BCLC), *The Alberta Library* (TAL), the regionalization of libraries in Alberta and British Columbia, the shared ILS in Saskatchewan, and the mixture of local and provincial responsibility for library services in New Brunswick. More than 200 of Ontario's small, rural library systems are part of a Shared Collections cooperative that allows them to buy and share ebook material. The program was initially funded in large part by the provincial government but is now fully funded by individual library boards and managed by the *Southern Ontario Library Service* (SOLS) and *Ontario Library Service-North* (OLS-North). Participation is, however, optional and bandwidth to many of the communities served is barely adequate for the current generation of ebooks and questionable for the next generation. No small library system can provide appropriate technology-driven library services without being part of a larger unit of service. For the brand name to have power and meaning, all Canadian public libraries must provide a mixture of physical and virtual services. Even large library systems now understand that they need to work

Rural Canadians need better bandwidth. Where the terrain is so mountainous that even satellites cannot make broadband practical, the local public library could and should be the most wired placed in the community, a place where people can access new tools to enrich their lives.

more closely together to deliver services. CULC has been holding conversations with publishers and vendors and with large American libraries to improve ebook contracts. They create consortia to buy RFID tags and other material.

Rural library services and the ability of rural Canadians to participate fully in society are affected by limitations on bandwidth. Without sufficient bandwidth, Canadians cannot use an increasing number of government services, book vacations, research health concerns, improve their job skills through formal and informal learning, offer their goods and services to others or download music, videos, and reading material. As a 2002 Government of Canada study, *Rural Youth Migration*, makes clear, greater connectivity to social networks and to digital media would help rural youth feel connected and perhaps arrest their migration to large population centres.

Rural Canadians need better bandwidth. Where the terrain is so mountainous that even satellites cannot make broadband practical, the local public library could and should be the most wired placed in the community, a place where people can access new tools to enrich their lives. The submission from the *Nunavut Library Association* (NLA) clearly identifies the digital divide:

This divide includes issues of hardware, broadband capacity, and the very high cost of service. Community libraries are most heavily used by people seeking access to the Internet, as many residents have neither computers nor an Internet connection at home. Government and college libraries are severely restricted in the size of documents that they can provide due to system restraints caused by lack of broadband capacity. To date, only the Legislative Library of Nunavut has sufficient electronic storage space to house a repository for government electronic publications. Nunavummiut are keen to adopt innovations in technology, particularly those that make it easier to connect our very widely dispersed communities that lack road access to each other and the rest of Canada. They would like to have equal access to such services as ebook lending, electronic document delivery, and access to electronic databases.

The federal government regularly announces initiatives to improve rural bandwidth. Still, far too little seems to be accomplished. Even when bandwidth is improved, the demand for new services changes more quickly than bandwidth improvements.

Recommendation

THE PANEL RECOMMENDS THAT:

Aboriginal Canadians, particularly in Northern reserves, experience problems of access, inadequate bandwidth, and often the inadequacy of physical and digital resources. The most pressing issue is the acknowledgement of the existence of these problems.

When public library services are denied or curtailed, the opportunities for early childhood education, the development of literacy skills, regular school attendance, and community cohesiveness and pride are sadly diminished.

39. provincial and territorial governments recognize, through legislation, the need for urban and rural libraries to provide digital services.
40. the federal government, namely Industry Canada, adopt the need for better rural bandwidth as a higher national priority. We make this recommendation fully recognizing that the federal government has increased its spending on rural broadband initiatives but aware, as well, that these initiatives are not part of a formal, national strategy. There is no commitment to meet specific standards in rural areas. Realistic timelines for the delivery of acceptable bandwidth into all Canadian communities are needed.

● II. SERVICE TO UNDERSERVED CANADIANS

The Panel has learned of other divides. In our estimate, Aboriginal Canadians, new Canadians, and print-disabled Canadians constitute underserved populations. Inequitable access applies not just to the gap separating urban and rural libraries but to the situations of these specific groups.

Aboriginal Canadians, particularly in Northern reserves, experience problems of access, inadequate bandwidth, and often the inadequacy of physical and digital resources. The most pressing issue is the acknowledgement of the existence of these problems. Municipal councils, provincial and federal ministries, and professional associations all appear to distance themselves from the realities of inequitable or, in some cases, non-existent access. During our consultations we heard of municipalities refusing to allow bookmobiles to enter a reserve because its citizens did not pay taxes to the municipality. The denial of library services in these circumstances contravenes every principle of advancement and understanding that libraries enshrine. While it is true that a facility such as the Red Crow Community College Resource Centre in Cardston, Alberta, is a fully equipped *academic* library with a special focus on Blackfoot/Blood language and culture (with over 15,000 books, 10,000 ebooks, and millions of dollars of electronic databases), comparable examples of *public* resources on reserves are in short supply. When public library services are denied or curtailed, the opportunities for early childhood education, the development of literacy skills, regular school

attendance, and community cohesiveness and pride are sadly diminished. We remind our readers of Patricia Cook's moving autobiographical account, in the Values chapter, about the refuge and guide of the public library transforming her early life.

Programs to welcome and integrate new Canadians to the community and the city are much more robust. Widespread literacy programs, the availability of social work assistance, and access to technology to communicate with family and friends contribute in very moving ways to a sense of belonging. Most of these program features are available in urban libraries. However, their absence in under-resourced rural libraries can heighten isolation and withdrawal among new Canadians.

The issue of accessible formats for print-disabled Canadians was repeatedly brought to the Panel's attention during our consultations. With our mandate to investigate service to underserved populations, we determined to understand the issue and the apparently competing perspectives. Our goal is to contribute to the establishment of an effective and sustainable service for print disabled Canadians. We sought advice from many people, most particularly Paul Whitney, a consultant and former City Librarian of the Vancouver Public Library (VPL). Whitney is also Chair of the *Council on Access to Information for Print Disabled Canadians* (CAIPDC), making him a knowledgeable commentator on the issue.

In February 2013, LAC released "*Summative Evaluation: Initiative for Equitable Library Access Final Report*." The Initiative for Equitable Library Access (IELA), which had been announced in 2007 with a budget of \$3,000,000, was a three-year initiative managed by LAC and intended to implement the recommendations of a CLA Working Group report, *Opening the Book: A Strategy for a National Network for Equitable Library Service for Canadians with Print Disabilities* (2005). IELA was intended to create the conditions for sustainable and equitable library access for Canadians with print disabilities and to make recommendations to the Minister of Canadian Heritage on future federal government engagement with the issues. In 2011 LAC announced that a national consensus on a way forward was not achievable and \$1.5 million was returned to the Consolidated Revenue Fund. The Canadian National Institute for the Blind (CNIB) was subsequently given a grant to undertake a broad consultation on the development of a central agency for the production and distribution of alternate formats for print disabled Canadians.

LAC did not engage in this consultation or subsequent developments. The LAC decision to dissociate itself from the issue of alternate formats ended over ten years of direct involvement from, first, the National Library (NL) and subsequently

LAC. Federal government involvement, from LAC and its predecessor had dated back to the jointly sponsored NL and CNIB *Task Force on Access to Information for Print Disabled Canadians* and its 2000 report *Fulfilling the Promise*. Arising from this report, NL formed the *Council on Access to Information for Print Disabled Canadians* to advise on implementing the recommendations in the 2000 report. The Council met for ten years. Given over a decade-long engagement with the file, LAC and its predecessor have been viewed by the community of users, service providers, and publishers as the federal government's lead agency on the availability of alternate formats for the print disabled. There is now a federal government void.

As technologies continue to advance in ways that make it easier to adapt material for print-disabled Canadians, the community of users and service providers needs an engaged interlocutor to monitor advancements and to improve service. Since many potential advances involve copyright and federal regulations, LAC is well positioned to act as the federal government's advocate for print disabled Canadians.

In 2012, CNIB issued *Reading Re-Imagined: A National Digital HUB to Support Service Delivery to Canadians with Print Disabilities* and initiated consultations on implementing the HUB model. Central to the vision for a national service delivery, HUB was CNIB's stated intent to cease its engagement with the production of alternate formats and provision of library service. There is widespread acceptance of the principle behind this decision: equitable access to information for print disabled Canadians is a legal and moral human right that should not be a charitable undertaking. Arising from the 2012/2013 consultations, CULC agreed to work with CNIB to transition its library service to a new entity, the Centre for Equitable Library Access/Centre d'accès équitable aux bibliothèques (CELA/CAÉB) in the late Fall of 2013. CELA has been incorporated as a federal not-for-profit organization with a governance board and budget funded by CNIB and individual libraries. The medium-term objective for the initiative is to phase out direct CNIB involvement with the new agency, which would assume responsibility for existing CNIB collections and production infrastructure. The CELA business plan calls for funding from the federal government, as well as provincial and municipal (through public libraries) governments.

At the same time as the emergence of CELA, another national initiative for the provision of alternate formats for Canadians with print disabilities has appeared with the support of several key provincial government ministries responsible for public libraries: the *National Network of Equitable Library Service* (NNELS). Utilizing the technology infrastructure of the *British Columbia Libraries Cooperative*, NNELS is

Facing page:

Marc Siegener

Analogic Kinship, 2010

Digital screen print,
coloured pencil, acrylic
paint, chine colle with
rice starch paste on paper
75.3 x 54.7 cm

Collection of the Alberta
Foundation for the Arts

a decentralized model depending upon in-kind contributions of content production from participating agencies.

Why are there now two competing service models for provision of alternate formats for print-disabled Canadians? The Panel is uncertain about the rationale behind this development, but it is clear that the current situation is not in the best interests of print-disabled Canadians. Nor does it make sense for government at all levels, which will have to be engaged with the establishment of a sustainable long-term solution. The Panel notes that Canada is the only G8 country which does not directly support, at the federal level, the production and distribution of alternate formats. Persuasive arguments originating with the Charter of Rights and Freedoms and international treaty obligations suggest that non-engagement by the federal government is indefensible, both morally and, potentially, legally. This statement by CLA President DeYoung on 23 June 2014 identifies the urgency of action:

There is currently an information gap between those who can read traditional print and those who need alternative ways of accessing the information they need and deserve. CLA hopes and strongly urges the Government of Canada to sign the VIP Treaty without further delay, in order to support and improve access to information for persons who are blind and visually impaired.

Given LAC's past involvement with print disabled Canadians, the Panel supports direct involvement by LAC as a facilitator, helping concerned parties to reach an acceptable outcome in the interests of the estimated three million print-disabled Canadians.

Recommendations

THE PANEL RECOMMENDS THAT:

- 41.** LAC re-establish its role as mediator working on behalf of print-disabled Canadians, and in the first instance bring all competing service providers together, including non-aligned representation from the print disabled community itself, for the purpose of seeking a single, sustainable, and effective service model that is welcomed by the print disabled as the best in service of their interests. It is recommended that in the absence of a mediated settlement, LAC will seek to craft a governmental/political solution to achieve a similar purpose.

42. provincial and territorial governments work with the federal government to ensure that Aboriginal Canadians receive fair and equitable access to public library services.

● III. INTERLIBRARY LOAN AND COOPERATION

The Panel received numerous submissions and heard from many speakers lamenting the fact that LAC no longer provides an InterLibrary loan (ILL) service. While it appears that LAC has revised its position and will act as the lender of last resort, submissions have highlighted ILL as a major issue for small rural libraries in Canada.

ILL was originally intended as a mechanism for academic researchers, including researchers who are not connected with academic institutions, to collect material from libraries far from home. Today, many public library requests come from dedicated readers trying to supplement collections of adult fiction, home schooling parents looking for material to support the learning of their children, amateur genealogists, and occasionally from researchers.

Technology and the world of publishing have changed the economics of ILL. It can cost more than the retail value of a book to have the loan shipped to another library and then returned. In some jurisdictions, such as British Columbia, lending libraries are compensated while borrowing libraries are not. In others, such as Ontario, neither library is compensated, but there is an effort to balance the load on libraries. In Québec, the academic library network established “mesures compensatoires” that are charged or credited to libraries once a year, based on the net results of loans or borrowings made at each institution. Some public libraries, such as Mississauga’s, have withdrawn from Ontario’s ILL program, stating that it is cheaper and produces a better service when they simply buy used copies of requested books, so long as these requests meet their system’s criteria.

While some libraries may state that they will not lend recently released or recently purchased material, there are rarely clear standards for what can be lent or for what library users should expect from the service. Ontario public libraries, as an example, are prohibited by legislation from passing along any fee that a lending library might decide to charge. As a result, customers are sometimes told that the library system cannot borrow an item, based more on cost than on the nature of the customer’s need. Even when physical items are being lent, ILL is rarely a timely service and is more difficult for residents of Canada’s territories since there

are no large cities and no large universities in any of the territories tied to their ILL networks. Libraries in other jurisdictions often charge non-resident borrowing fees, making ILL an expensive service for residents of Canada's North. This does not mean, however, that LAC is a logical choice for lending material to northern residents other than for research purposes.

ILL is an awkward means of meeting basic user library needs and, as more and more material is purchased in ebook formats, contracts will prohibit libraries from lending material to users who are not covered by contract agreements. In fact, many ILL policies may be outdated. When an item can be purchased online for far less than the cost of finding it in a library and arranging to have it shipped between library systems, does our insistence on a technique (lending material) overpower consideration of alternative ways of getting material to readers?

The problems of ILL service are a microcosm of larger issues that plague Canada's library community. In most provinces and territories, university/college libraries and school libraries are funded by different jurisdictions. School libraries, when funded at all, receive their budgets from school boards. Government departments fund government libraries. Corporations or institutions with a narrow mandate to provide specialized services to a specific clientele usually fund special libraries. Local municipalities fund public libraries.

Services other than ILL can also be inconsistent. Students at one school board may be taught how to use electronic databases to research topics of interest only to discover that they do not have access to these same or similar resources once they graduate. Teachers may require that students read print books from their public library on a particular topic, only to be told at the public library that all material on the topic is electronic. If we are to teach students to be prepared for post-secondary education and for researching issues of interest throughout their lives, we have to ensure that the tools they use as students continue to be available to them as adults and we have to coordinate services. In January 2014, we heard from a newly minted University of Toronto PhD. She told us that her *gift* (her word) from the university upon graduation was that she lost access to the library material she had used to gain her PhD and that she needed to keep her knowledge up-to-date.

The awkwardness of ILL services highlights divisions within the library profession, as well as a lack of public understanding regarding these divisions. The public expects that the unifying bond between organizations with the name *library* is stronger than the differences in how they are funded and who they primarily serve.

If the public is to receive the seamless service it expects from the *Library* brand, a brand synonymous with openness and welcoming inquiry, then libraries themselves may have to work together, across sectoral lines.

There have been many Canadian attempts to create province-wide library services to allow for a seamless customer experience. Knowledge Ontario is perhaps the most notable. It collapsed several months after receiving the CLA Innovation Award. After years of lobbying, Knowledge Ontario's Board had managed to acquire provincial funding for a number of cross-sectoral projects, including provincial licenses for databases. These provincial licenses ensured that the resources all Ontario K-12 students used would be available to them through all Ontario public libraries and that K-12 students who studied in universities and colleges would know how to use electronic resources when they arrived. Since all Ontarians had a right to access these resources, log-in processes could be simplified. Knowledge Ontario failed because the provincial level of government could not figure out how to fund a program that affected libraries receiving funds from separate provincial government ministries.

Knowledge Ontario and other examples across Canada (such as the discontinuation of British Columbia's cross-sectoral chat reference service) demonstrate that governments struggle to understand issues that affect libraries across sectors. If the public is to receive the seamless service it expects from the *Library* brand, a brand synonymous with openness and welcoming inquiry, then libraries themselves may have to work together, across sectoral lines.

Past attempts at cross-sectoral alliances often failed when governments would not pay for the inclusion of small libraries and school libraries. Perhaps the more realistic approach is for libraries that have resources and that share a common vision for the *Library* brand to work together and build such compelling products and services that others want to participate. We have a superb example in Scholars Portal, a collaborative project which uses the resources of Ontario's university libraries to build services that could and should be used by libraries across Canada. The roadblocks are jurisdictional.

A New Relationship with Publishers and Vendors

LIBRARIES ARE STEWARDS for content that is most often produced by publishers and distributed to libraries by vendors. The world of publishing, particularly Canadian trade and academic publishing, is experiencing disruptive pressures. As the number of Canadian booksellers continues to decrease, publishers are losing markets for their print material. Canadian trade publishers have traditionally used profits from foreign distribution rights to anchor their business models. Today, more and more books are sold as ebooks through sites that are not

Canadian and print titles can be purchased online from foreign-based companies, bypassing Canadian distribution rights. The result is that Canadian publishing is a precarious business. Publisher Scott McIntyre of the now-defunct Douglas & McIntyre publishing house calls the emerging world of ebooks “the wild, wild west.” Canadian publishers are struggling. When they try to distribute their books in electronic formats, Canadian publications become lost in the international marketplace, hidden even from Canadians.

As publisher Jim Lorimer told us in Toronto at the Ontario Library Association (OLA) Superconference in January, the search terms used to locate ebooks are American-oriented and Canadian books become lost in an immense jungle of available titles. Canada’s libraries need a healthy publishing industry and Canadian society needs to be exposed to thoughts, ideas, and stories produced by Canadian writers. In the past, libraries and publishers had a distant relationship, with distributors placed in the middle. We see the need for a much closer relationship. For example, Canadian publishers are having a hard time finding their potential readers, but many of those readers are library users.

Toronto Public Library (TPL) has recently begun to make it possible for users to purchase books through its website. The program, which is not without critics, may offer a glimpse into publisher/library relationships that may be needed to support publishing. Critics of TPL’s program lament any form of advertising at a public library, which is ironic since virtually all public libraries now carry product lines named for companies that provide content. Libraries have databases managed by Ebsco and Gale, ebook collections provided by Overdrive and 3M and Access 360, magazines provided by Zinio, and video accessed only through Hoopla. Users are asked to search for books and music and video and magazines by clicking on icons named for vendors. It is the virtual world equivalent of physically housing books on library shelves by publisher and asking customers to remember the name of each publisher when searching for specific material.

In the virtual world, libraries seem to be losing control of the ability to manage their collections, creating one place to look for everything the library owns, leases, or licenses. Libraries are trying to create unified collections through the use of discovery layer catalogues but libraries often meet resistance from vendors who want their products to be highlighted and branded. Vendors need to understand that their insistence on branding their products is confusing users and potentially destroying the marketplace. Libraries need to understand that vendors need business continuity and stability. Better communications can create a stronger library experience for users and more demand for their product than publishers and vendors provide.

Libraries are trying to create unified collections through the use of discovery layer catalogues but libraries often meet resistance from vendors who want their products to be highlighted and branded.

Recommendations

THE PANEL RECOMMENDS THAT:

43. where necessary, ministries of provincial and territorial governments with a responsibility for the delivery of public library services support Canadian public library systems in forming larger units of service in order to provide adequate technologically-driven services, to mandate the provision of these services, and to promote the purchase of ebook material through consortia.
44. each province and territory review its InterLibrary loan policies in order to ensure that these policies mesh across sectors and place an emphasis on the research needs of Canadians and not on everyday library reading needs. Other mechanisms, such as ebook cooperatives, should be developed to meet everyday needs of users. Responsibility lies with the various provincial and territorial library associations plus CLA, working in alliance with LAC as a partner. Provincial and territorial government ministries should be involved, since changes may involve regulations and policies. Since college, university, school and public libraries often report to multiple ministries, it is impractical for government to act as the lead.
45. libraries and publishers work more closely together with an understanding that they are part of the same ecosystem and need each other to be successful and to provide Canadians with access to the content they need. Since public libraries deal more with trade publishers, responsibility lies with the *Canadian Urban Libraries Council*. CULC libraries produce almost 90% of all Canadian public library circulation and CULC is designed to act quickly and to help libraries as organizations. Since academic libraries deal more with academic publishing, responsibility lies with the *Canadian Association of Research Libraries*. For products used by all sectors, such as electronic databases, CULC and CARL should work together.
46. CULC and CARL, in conjunction with BiblioPresto and international library associations, support libraries and vendors to work in closer collaboration, allowing libraries to obtain content that can be merged into

unified collections emphasizing the nature of the content itself and not the name of the vendor who provides that content.



These sketches seek to emphasize the importance of the foregoing discussion by offering imagined but by no means improbable accounts of how effective, well-resourced public libraries serve the populace, here a new immigrant and a senior.

Huwaida

Huwaida recently arrived in Atlantic Canada from the Sudan. She and her husband and two young children are refugees whose lives have been difficult and disrupted by the turmoil in her country. She is grateful to be settled in a new community where she can hope for a better life for her children and where family life can begin to return to normal. Everything about her new home is different, often confusing and hard to understand. She received very little education when she was a young girl, speaks very little English, and feels lonely and isolated in her apartment when the children are at school and her husband is working long hours to support the family. She is embarrassed to be dependent on her children to translate for her when she goes to a medical clinic or when she meets with an Immigrant Settlement worker. How to ride the bus, how to get a health card, where to buy food, how to fill out government forms – these are all mysteries and complications in her life. She would like to learn all these things and make friends in this new place.

Huwaida heard from others who immigrated to Canada and who lived in her building that the public library near her apartment could help. She walked to the library and quickly discovered that it was a place where she could feel safe and be welcomed even though she dressed differently and had so little English. A librarian, who spoke her language, told her about the English Language learning classes that she could join along with other women just like her. In these classes she made friends and began to feel more confident in speaking English. Best of all, there were many programs and activities for her children so that she was able to work with a tutor, knowing that her children were safe and engaged. She

enjoyed knitting and was welcomed into a woman's knitting group where she could practice her English and socialize with other refugees and Canadians at the same time. News from her homeland and staying in touch with family and friends left behind were important to Huwaida. In the computer class for women, she learned how to send email, and how to find newspapers and information about Sudan to be informed.

At the library, she found out about neighbourhood resources, received help in finding government information and help with forms and even had her income tax return prepared for her in the library's volunteer staffed tax clinic. All of these things were free. And the library had computers that she could use anytime free of charge. The books her children took home, especially the picture books and simple English books helped her build her language skills. Huwaida began to feel comfortable in this new environment and looked forward to the day when she could become a Canadian citizen. The library had a citizenship preparation class to help her with that too.

Margaret

Margaret is 85, living in the home that she and her husband bought in the 1950s, in a quiet Halifax neighbourhood. She and her husband both retired long ago but remain active and interested in what's going on and until recently enjoyed good health. Margaret never learned to drive and depends on her husband or friends to take her shopping or to the library. She loves to read, but since her eyesight is not as sharp as it once was, she finds large print to be the best option. There is a computer in the house, used mainly by her husband, but she is uncertain how to do anything but basic functions and most importantly emailing her children and grandchildren who moved away.

Margaret's branch library nearby has a large print book collection and she borrows from it whenever she can get to the library, but she finds the collection heavily weighted towards romance novels and bestsellers. She prefers non-fiction, biographies, and books about current affairs and topical issues, but these are in short supply and often not available in large print. Library staff have suggested that she sign up for one-on-one computer assistance to learn how to download ebooks and audio

books in order to expand the selection of material. She does not feel comfortable with reading on a computer screen and would prefer a printed book to hold in her hands and be able to read anywhere in the house. But she is thinking of taking up the suggestion in order to be able to get more of the things she likes to read.

In the winter months, snowstorms and icy sidewalks make her fearful of falling, and restrict her ability to get to the library. She has decided to register for Home Delivery service next winter. A profile of what she likes to read and favorite authors will be kept on file at the library, and books will be chosen for her matching the profile. Books will be delivered to her door by a staff member or volunteer and collected when they need to be returned. This service has the added bonus of providing an opportunity for a chat and visit, along with the books. Margaret's friend who lives in the country receives her books from the library's Books by Mail service.

From time to time, both Margaret and her husband enjoy attending programs offered at the library, which help them stay current with issues, learn how to do new things or simply to meet neighbours, renew friendships or make new friends in a comfortable atmosphere. And of course, programs are free of charge, a welcome boost to those on a fixed income.

I. Federal Libraries

I haven't been to the NRC library in 10 years, but I use it every day.

—NRC Scientist

Recent History – A Snapshot of the Federal Government Environment, 2004-2014

FEDERAL LIBRARIES are affected by the same trends and challenges as all other libraries. How people find, use, and share information has changed dramatically and clients demand more self-service and availability of as much information as possible from their computers, anywhere and anytime.

In addition to these pervasive trends, the Canadian government has launched a number of initiatives over the past ten years that directly or indirectly have had a significant impact on federal government libraries.

In 2004, Library and Archives Canada (LAC) was created, bringing together national library, government records, and archival services into one institution. It is fair to say that the merger of the former National Library and National Archives institutions consumed the new LAC during the initial two-year transformation period and for several years beyond. Internal issues such as organizational structure dominated much attention, and institutional priorities appeared to be in constant flux.

From 2007 to the present, budget reductions have been an ever-present imperative for all aspects of government operations, programs, and services. The Strategic Review program from 2007 to 2010 held rounds of reviews and achieved \$2.8 billion in annual savings, according to the Treasury Board Secretariat (TBS) (<http://www.tbs-sct.gc.ca/sr-es/res/res-2010-res-eng.asp>). Strategic Review was succeeded by the Deficit Reduction Action Plan (DRAP) announced in Budget 2011, with a target of achieving \$4 billion in annual savings by 2014-15. Both required senior government executives to implement reductions over a 1- to 3-year period. Due to the level of confidentiality of these budget reduction exercises, consultation within departments (with subject experts, information professionals, and librarians) and among departments appears to have been minimal. It has also been difficult to gain a clear picture of the impacts on libraries, and to understand whether reductions to library budgets have been proportional to those in other programs and services.

During the same period, the Canadian government also began to focus on whole of government or enterprise approaches to program delivery, touted as both expenditure reductions and efficiency measures. Among these:

- LAC and TBS were focused on sweeping changes to the government Recordkeeping and Information Management practices.
- In 2009 a Task Force on the Future of Federal Libraries was established, supported by Library and Archives Canada, and co-chaired by Health Canada and LAC. Its purpose was to “set out a vision and provide strategic direction and guidance on how federal library service can better support the GC and improve service to Canadians.”
- TBS and LAC communicated future shifts from departmental to government-wide services (e.g. a Federal Virtual Library) well in advance of any real action plans for implementation. As one example, the Federal Virtual Library

was mentioned in a 2010 letter from LAC Head Daniel Caron to senior executives, yet by April 2014 there is still no definition of this announced service.

- The Government of Canada created Shared Services Canada in August 2011, to transform the management of the Government's information technology (IT) infrastructure, by centralizing email, data centers, network and telecoms, as well as all IT procurement.

Each of these trends within the Government had distinct impacts, and their combination had a multiplier effect on the federal library environment.

Current State of Special/Federal Libraries: Impacts on Federal Libraries

THE IMPACT OF THESE SIGNIFICANT CHANGES is not yet fully understood as they are still being implemented while this Report is being compiled. Some early observations and indicators are noted below.

The budget review programs resulted in major reductions to federal departments and agencies. Strategic Review in particular was intended to be a program-by-program review, rather than across the board percentage cuts. When libraries were affected, the impact ranged from small to significant, and in several cases extended to closure of the library and lay-off of all staff. Some libraries were merged with other functions such as Information Technology (IT), Information Management (IM), or Knowledge Management (KM). Information available from budget review initiatives is not comprehensive enough to draw conclusions about the overall financial impact on federal libraries. For example, up to May 2012, the data compiled on twelve libraries, including LAC, NRC-CISTI, and ten others, reveals that 445 positions were cut between 2009 and that date, with a savings of thirty million dollars. Two-thirds or more of these reductions were to the two larger institutions. There have been additional rounds of budget cuts since then, which are not yet public.

The 2014 scan of federal libraries stated:

Many client groups, including federal employees, the public, OGDs (other government departments), and communities of interest are no longer served by departmental libraries, either due to closures,

reductions in staff, or because libraries have had to prioritize their departmental client base and services can no longer be offered to those outside the department.

In federal departments and agencies where there have been closures, the loss of experienced library personnel to provide relevant, authoritative, vetted information has had a negative impact on clients. The concern is that many federal employees in these departments no longer have access to the information resources they need to develop sound policies and make evidence-based decisions, which poses an inherent risk for the government.” (6)

As a result of the new Record-Keeping Policy and Directive, most government investment in information-related services has been in the infrastructure (IT and IM) necessary to meet the new requirements. Deputy Ministers are directly accountable and graded annually on their progress. There has been little to no investment in library transformation, although it has been occurring of necessity over the last ten years in response to external and internal challenges.

The Assistant Deputy Ministers (ADM) Task Force on the Future of Federal Libraries held its last publicly documented meeting in May 2011. The final update to the Task Force reflects a rosy picture of the future, which is interesting in retrospect since several members of the Committee were from agencies that eliminated their library services altogether.

In May 2011 and again in 2012, the LAC Deputy Head presented a whole-of-government model for a Federal Library Service to various Deputy Minister-level management committees. The goal of this model was an integrated and horizontal Government of Canada (GoC) library service model. The envisioned end-state was that all information resources would be available on the computer desktop. Strategies included a government-wide approach to the acquisition, procurement, and accessibility of information resources and GoC library holdings as one virtual collection involving physical consolidation, reduction of duplication, and optimization of space footprint.

An unintended consequence of the collision of these various factors was that Departmental senior executives understood they were accountable and had to report on IM (largely record-keeping) requirements, but they were not explicitly accountable or well prepared for an orderly modernization of libraries. Some may have assumed the federal library concept was imminent or already a reality. As

the budget reduction proposals were conducted under Cabinet confidentiality and primarily by senior executives, the impacts of some library decisions may not have been fully understood.

As one example, the reasons given by the ADM responsible for the Public Works and Government Services library closure included low usage of the library by employees, the fact that people now use the Internet to find information, cost savings, and finally, that the “TBS CIO Branch was coming up with a virtual library that would serve GC employees,” the latter a misunderstanding of both the timing and the intent of a concept that was not yet defined. The impression that everything was available on the Internet also betrays a lack of understanding of the value of the information created in their organization, or acquired by the library, for evidence-based decision-making and policy, and for scientific research.

The creation of Shared Services Canada also had an indirect but important effect. As it centralized major IT functions, the Chief Information Officer (CIO) role in the majority of departments shifted from IT to a focus on IM (including records management and often libraries). CIOs and IM managers were not always familiar with the role or value of libraries and their main impetus was to deliver results per the new IM guidelines. However, as many CIOs are quite senior in the federal hierarchy, and are gaining an appreciation for the library functions and roles, this may turn out to be a positive impact in time.

The erosion of professional archivists and professional librarians within LAC has been highlighted with dismay in many submissions to the Panel from the Canadian library and archival communities. This loss is mirrored in many federal departments, accelerated by reductions to library collections and library staff. There is a dwindling number of library managers with access to or influence upon decision-makers, as the library often becomes a small unit of a much larger IM department. This loss of expertise is especially important given the demographics at play; many of the experienced senior library managers and directors are retiring. From an expertise perspective, what this means is that the most ‘senior’ librarian may be at quite a junior level. Their primary concern is to deliver services to the clients, but they may not have the breadth of experience or the capacity to provide a vision of a future for library services. This could be one argument for a ‘whole of government’ library service, so that the vision and planning can be carried out by the right level of staff (managers) with the experience and knowledge essential to success.

From early in his tenure at LAC, former Librarian and Archivist of Canada Daniel Caron promoted a conceptual shift from discipline-specific professional

There is a dwindling number of library managers with access to or influence upon decision-makers, as the library often becomes a small unit of a much larger IM department.

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Regrettably, the longer-term issue of librarian expertise and services has been largely ignored, as has the growing need for the increased electronic access and e-services that are essential to any library today.

credentials to the concept of the generic information professional. This model was adopted within LAC and was promoted across the GoC in the TBS Recordkeeping Directive, which defined an Information Management Functional Specialist as:

... an employee who carries out roles and responsibilities that require function-specific knowledge, skills and attributes related to managing information such as those found in records and document management, library services, archiving, data management, content management, business intelligence and decision support, information access, information protection and information privacy. (<http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?section=text&id=12742>)

News of library closures began to appear in the media with greater frequency in late 2011, when the results of program reviews were leaked or made public. Some of the media attention was generated by the public service and university teachers unions, and by disaffected former civil servants. Unfortunately, the media exposure has largely centred on the relatively few closures, and on the physical libraries. Consolidations of branch library locations have also received substantial media attention, even though this was part of a longer term modernization of some of the larger libraries, accelerated by cost reductions. Regrettably, the longer-term issue of librarian expertise and services has been largely ignored, as has the growing need for the increased electronic access and e-services that are essential to any library today.

CLA (using data from the Library of Parliament Office of the Parliamentary Budget Officer) developed a chart showing the annual numbers of Library Science (LS) positions in the GoC from 1990 to 2012. The chart shows a decline of 29% overall for librarians for the period, with a drop at LAC of 60%. Senior positions (LS4s and LS5 are often managers) show a larger decline (48% overall, with a precipitous drop at LAC of 80%). However, it is not known whether LAC changed the classifications so there could be library professionals in new or other classifications. A related chart on the same site shows a drop in the number of historical researchers (largely LAC) of 31% since 1991. One caveat in this CLA data analysis is that it appears the NRC library staff were not included in this total for federal librarians, but their librarian numbers dropped by 23% between 2009 and 2013.

As news stories aired, groups such as CARL and CAUT, among others, began to express concern to federal MPs and Ministers. In 2012, CLA launched a campaign to discuss cuts to LAC and federal libraries with members of parliament. CLA President Karen Adams noted that "Government librarians provide essential

support to their departments,” and further that “Many of those library staff have expertise in specialized subject areas, in addition to their library skills, which helps them to assess and interpret information sources. Good policy relies on good information.”

The financial impact on federal department library collections is difficult to assess with accuracy, in part because many changes are occurring that are driven by technology and user requirements rather than solely by costs. Departments are modernizing library services to address the increased demand for information in digital form, with access from anywhere in the country. This demand requires library catalogues that represent all department holdings, and the means to loan or transmit documents on request.

As Mary VanBuskirk and Kathy Smith write about the Canada Institute for Scientific and Technical Information (CISTI):

Beginning in the mid-1990s, the extensive paper research collections in the Ottawa-area NRC branches were drastically reduced, replaced by a Virtual Library that offered immediate access to a broader range of electronic resources, supplemented by the face-to-face services of librarians and free Document Delivery. At the same time, access to the electronic sources in the Virtual Library permitted regional branches to reduce their paper collections, and offered CISTI the flexibility to provide information services to new NRC institutes wherever they might be created.

Today, most requests are received and delivered electronically, so digital library resources allow for easier search and access to clients regardless of location. External public use is quite limited for most collections. The Department of Fisheries and Oceans (DFO) library online FAQ notes that in 2011/2012, over 86% of requests to library staff for service were made by employees of the Department (<http://www.dfo-mpo.gc.ca/libraries-bibliotheques/FAQ-eng.htm>). As WAVES, the DFO Departmental library catalogue, can be accessed from anywhere in the world via the Internet, 85% of the external client requests were received virtually, that is, by email, phone, and mail. In that same year, in-person visits by external users made up about 2% of total requests for service; only 5 to 12 in-person visits were made at most DFO locations.

There are also differences in information searching and use practices, some of which are generational. Younger employees or clients who regularly do research from their desktop expect instant access to most information and to be able to

search and find information independently. Employees who are accustomed to using print sources, or who use information less frequently, may expect to walk in and browse at a physical library. Both still expect to receive support from a reference librarian for in-depth projects or complex tools. Government libraries provide licensed access to a vast amount of electronic information resources and databases. Most peer-reviewed research is now available in e-format.

Patrons in some departments and agencies have adapted to this circumstance, most very readily. However, government policy and regulatory research are often dependant on materials that are currently available only in print format. Libraries whose budgets are stagnant or decreasing are faced with difficult decisions about maintaining access to print materials, while improving and increasing access to digital information, and the supporting systems that facilitate finding the information and having the rights to use the materials.

Strategies for the Future

THE CONCEPT OF A FEDERAL GOVERNMENT LIBRARY has not moved forward as of June 2014. The lead agency was considered to be LAC, with involvement from TBS from a policy and management perspective. Without leadership from LAC, supported by DMs of all departments, the required consolidation will not happen.

In the absence of an enterprise initiative, individual department and agency libraries continue to respond to government changes and technology shifts, and to adapt to the best of their ability. This has been uneven due to vast differences in size between the small and large libraries, and the lack of consistency between departments.

Three strategies have been evident over the last ten years:

- A shift to electronic access and information;
- Streamlining processes which were sometimes outdated and inefficient; and,
- Reducing the resources spent on managing multiple physical locations across the country.

A fourth strategy is emerging, that is, the planned collaboration and integration among the science libraries, as highlighted in the Federal Science Library (FSL) insert.

The Federal Science Library (FSL)

8 federal science-based departments collaborating to deliver library and information resources and services.

Benefits:

Science, technology, and health researchers, program planners, and policy makers will have “anytime, anywhere” virtual access to high quality resources as well as services of skilled and knowledgeable library professionals and subject experts.

Single window of visibility and access for Canadians to the departments’ unique science library collections.

Accelerates the transformation from a traditional print and location-based service to a sustainable digital model.

The key findings from a consultation with the federal library community conducted in July 2014 confirmed this and added

[T]he more resilient federal libraries responded to trends in their environment by adopting the following strategies for the delivery of library functions in the future:

- Aligning library services with the core business of the organization.
- Broadening the mandate of library services and introducing new functions and roles around IM and collaboration support.
- Emphasizing high-end, client value services (instead of basic transactional library services).
- Increasing focus on desktop delivery of services and resources.
- Emphasizing information discovery services and self-service by clients.
- Putting more emphasis on partnering with other government departments to provide library services.

Federal libraries are increasing access to information in digital form, by purchasing or licensing e-journals and books, and by digitization of analogue materials either on demand or by targeting specific collections. Libraries are also re-organizing and weeding collections; libraries with multiple locations may have carried both print and electronic versions of some journals, or multiple print copies. Where possible (mainly e-journals, born-digital, or digitized reports and information), federal libraries are moving to service via the library portal or Internet, and purchasing only the digital version if available.

France Bouthillier, Director of Information Studies at McGill University, noted that it is entirely normal for libraries to continually assess, consolidate, and re-organize their collections: “Many types of libraries – corporate libraries, government libraries, academic libraries – are going through a lot of reorganization at the moment because of technology” (qtd. in Gerson). Digitizing books and weeding through ancient collections is meticulous and labour-intensive work. But shelf space is expensive; librarians spend endless, thankless hours curating content. Worthless or duplicate materials are routinely donated or destroyed by private recycling firms.

Federal libraries are also acquiring material consortially to save money and to secure better prices from vendors, either through the LAC Consortium, or through the FSL Consortium.

They share some technical and reference services, for example the FSL initiative. And, a strategy used by libraries of all types (academic, special, and public libraries) is eliminating, outsourcing, or sharing some repetitive tasks such as cataloguing. Librarians are also developing new skills in record-keeping and information management, and with these functions to find common ground and areas where they can share resources and solve common problems.

The consolidation of physical libraries to smaller numbers allows concentration of scarce resources on the dual access to print and digital information. It makes it easier to preserve and provide access to unique printed materials, and to deliver digital or print information via mail, email, or fax.

In summary, a gradual transformation and modernization of some federal libraries is occurring, but in the absence of skilled personnel in some agencies it will be uneven. Change has been made more difficult by the periodic seismic changes to funding, and the lack of investment in the systems, skills, and culture necessary for successful change. The Panel believes that federal libraries should be able to provide access to physical collections as well as virtual collections, and to professional services that render those collections meaningful and accessible to federal employees, including policy and decision-makers, scientists, and knowledge workers of all types.

Recommendations

THE PANEL RECOMMENDS THAT:

- 47.** the Federal Science Library (FSL) be used as a pilot to demonstrate the concept of an integrated library model. This initiative is well advanced and represents a demonstration of a cost-effective and scalable service delivery model. The goal of the 8 departments and agencies involved is to provide increased visibility and access by Canadians to GoC print and electronic library collections. Responsibility lies with the National Research Council Knowledge Management (NRC-KM) and Agriculture and Agrifood Canada (AAFC), supported by LAC and TBS.
- 48.** LAC use the pilot findings to determine a realistic and informed strategy for scaling to a whole of government approach that provides a platform

for search and discovery, management of library resources, document sharing, and consortial acquisitions. Resources saved over time can be re-invested in licensing more electronic information, digitization of print-only materials, and ensuring librarians' expertise is available for training, in-depth reference, and supporting open publication and open data requirements within their agencies.

49. LAC, with financial investment from finance and the individual departments, invest in the enterprise-level basics necessary to ensure success of the proposed model changes. Many department libraries and IM groups lack the resources and capacity to manage change while coping with significant continuing re-organization. This initial investment will result in lower costs and better service over time.
50. LAC promote the value of federal libraries, to reflect that they are integral to government knowledge workers and informed decision-making. It is also recommended to promote the value of library professionals to the fields of archives, libraries, and records and data management.
51. individual departments and agencies invest in the information resources and library expertise necessary and appropriate to serve their clientele, and support their continued professional development.

See related recommendations in the Analogue Cultural Patrimony section above.



This portrait of an independent science researcher illustrates a complex set of circumstances in which available infrastructural networks can advance her career.

Natasha

Natasha is a scientist in her mid-30s. She earned her M.Sc. and Ph.D. in Bioinformatics at McGill University. For the next three years she held post-doctoral fellowships at McGill University and the Université de Paris. She then worked for three years for a private sector multinational from their Montréal office. When her firm closed its Canadian R&D lab, she chose not to re-locate to Europe, and became an independent

research associate. She is currently working on an international project that includes two private sector firms and McGill University.

She works with a research team whose members are located in Europe, North America and Asia. While they occasionally meet in person, she mainly works from a medical research building on the McGill campus in the center of Montréal or from home.

Natasha needs access to scientific journals and databases. She also relies on business and market information and data when preparing new research proposals. She needs high-speed wireless access as well as videoconferencing capability from her computer in order to stay close to other team members in Europe and Asia. Her team requires large-scale computational capacity to run simulations, data mining, and use visualization tools.

She prefers to do her own searching for most information about her disciplinary area of research. However, she wants advanced services and analysis for analyzing worldwide advances and patents in her field, to avoid duplicating research work already being done. This also helps to give some idea where the potential partners or competitors may be if this research is pursued.

Some of the journals that Natasha needs are Open Access (OA) journals, but many are not. Subscriptions are very expensive, and because she is not faculty or student at McGill, the licenses do not permit her to access much of the content from the largest and most well-known publishers. This also makes it difficult to do comprehensive searches. She does online ordering via the NRC National Science Library, when project budgets permit.

Her access to data is via some open access databases, tools and services (GenBank, European Bio-informatics Institute). However, she also needs access to databases that require institutional membership or affiliation.

Natasha has excellent skills and training on relevant publisher and aggregator databases, although she does not have training on some of the more specialized biomed tools or the business databases. She has formulated data management plans (DMP) in the past, but would like some help in understanding the Canadian granting council

requirements, which apply to McGill University, and EU funding requirements.

She may need personalized help to access subscription databases in order to analyze patent landscapes and market information.

A Plausible Future Scenario based on RSC recommendations

Natasha needs seamless access to content including subscription journal articles, grey literature, open access journals, and research data in her field – how does she do this when working outside of a major academic institution? Post-university, researchers become nomads or information orphans, unless they are tied to large institutions.

Canadian university libraries support OA initiatives that make journals available free of charge to all. This includes placing copies of researcher papers in institutional repositories, supporting them to publish in (author-pay) OA journals. By networking these they have created one virtual journals database, easily searchable with alerts when new material is posted. It includes datasets as well as articles. Academic libraries accelerated their efforts to license information that covers the widest possible audience, and with added partners have found funding to broaden that access to cover independent researchers or small firms.

Natasha can make her own work available freely (when and where her employer agreement permits) through these or international sites. However, she can't always afford to do this, as prices are high for open access submissions – for example the Public Library of Science (PLOS) charges around \$1,000 per article, and some are much higher.

Q. How does Natasha get access to specialized support from an information specialist or liaison librarian?

>> The team uses a virtual reference group comprised of McGill University library, the Chinese Academy of Sciences (for advanced visualization and data mining tools and techniques), and the National Research Council (the team member in Saskatoon's plant biology facility can access some advanced technical intelligence from the NRC Knowledge management group).

Q. How does Natasha get access to the computational capacity needed to do her work?

>> Right now, the team is partly supported by a two-year grant from the Natural Sciences and Engineering Research Council. As proposed by CANARIE and Compute Canada, researchers submitting proposals to Canada's granting Councils are now provided with a list of digital infrastructure tools available (network, compute, software, storage, etc.), and are required to identify what other tools they need in addition to these infrastructures. A networked infrastructure with government and university nodes is available for small and large projects that wish to preserve and provide access to their data.

J. School Libraries and Learning Commons

INDIVIDUAL CANADIANS' FIRST EXPERIENCE, and thus their first perception, of libraries most likely occurred in a children's reading program at a public library when attending a voluntary pre-school, or as an obligatory component of their primary school experience. The former event would have been in the company of parents, while the latter was the result of a structured curriculum. Whichever alternative or perhaps both (and the answer could be generationally and socio-economically specific), the experience will have affected learning success through to adulthood.

In this section we discuss the school library, sometimes referred to as the Resource Centre or more recently as a School Learning Commons, and by extension the role played by teacher-librarians. The Panel did not have a school library expert among its membership. Nonetheless, understanding the foundational role that the approximately 14,450 school libraries (variously named) could play, we drew upon external expertise. We turned to Ken Haycock, a renowned researcher and commentator on the topic.

School libraries have been twenty years in decline. Lament for the weakening of this infrastructure had been heard for a decade, but it was Haycock's seminal 2003 report and call to arms, *The Crisis in Canada's School Libraries: the Case for Reform and Re-Investment*, which drew widespread attention to the situation. By consolidating and synthesizing available international research, he made a compelling "case for reform and re-investment":

School libraries have been twenty years in decline.

At its best, a school library can provide a child the opportunity to find that first “home run” novel or stumble across a science book teeming with the sorts of experiments that spark a budding imagination. By offering some key clues on researching a project or navigating the Internet, the teacher-librarian as an educator plays a crucial role in a teenager’s eventual success at college or university. School libraries are so much more than rooms dedicated to storing books. . . . No one should be shocked to learn that if children have access to a wide range of relevant books and library materials they will be more likely to use them, both for learning and pleasure. No one should be astonished to discover that if students and teachers can take advantage of the guidance provided by a qualified teacher-librarian, young people will be more likely to learn the sort of critical thinking skills that are increasingly important in an information-saturated society.

In the 10 years since the Haycock report, which also decried the lack of relevant Canadian research, the situation has worsened. Many observers and commentators believe the decline has accelerated in spite of continuous and compelling research, much now Canadian-based, demonstrating the positive influence of the school library in enhanced literacy, higher test scores, greater success at the post-secondary level, and advanced citizenship. All this has occurred in spite of the hard and vigorous advocacy by many parties, including both national and provincial libraries, educational associations, and grass-roots groups such as Ontario’s People for Education.

At the same time, however, young people are adopting information and communications technologies, both outside and inside school, with great relish. In many schools these technologies have transformed the teaching and learning environment. Thus, it has been argued that the traditional school library, with its print and multimedia collections, should be transformed into a technology-rich environment with access to print, multimedia, and digital resources. We are also persuaded in this regard by the research, analysis, and modeling undertaken by individual associations. We cite as an example the report of the Ontario School Library Association (OSLA), *Together for Learning: School Libraries and the Emergence of the Learning Commons: A Vision for the 21st Century*. We are also persuaded by the substantial work of prototyping the development and implementation of the school library/learning commons that was recently undertaken collaboratively by school library organizations across Canada, and published by CLA, *Leading Learning:*

What does not make sense to us is the absence of either the school library or the learning commons or their amalgam in so many of the nation's schools.

Standards of Practice for School Library Learning Commons in Canada. What does not make sense to us is the absence of either the school library or the learning commons or their amalgam in so many of the nation's schools.

As recently as Summer 2014, the Canadian Education Association's (CEA) *Education Canada* magazine called for "Well-staffed, Well-stocked, Well-used" school libraries. The article's author, Dianne Oberg, stated:

Well-staffed school libraries have qualified teacher-librarians - accredited teachers with additional graduate level qualifications in librarianship, digital technologies, and inquiry-based pedagogies.

Well-stocked school libraries include local holdings in multiple formats and access to digital resources through the Internet.

Well-used school libraries are integrated into the intellectual and cultural life of the school and community. The library is accessible outside school hours, allowing visits by teachers and students, as well as electronic access to resources 24/7. (<http://www.cea-ace.ca/education-canada/article/ignoring-evidence-another-decade-decline-school-libraries>)

The often-referenced number of school libraries (14,450) masks a disturbing reality. These spaces are not generally well-staffed, well-stocked, or well-used. Most are largely irrelevant to both print and evolving digital cultures. To be sure, we encountered dedicated teacher-librarians and librarians labouring under difficult circumstances, coping as well as possible and promoting the need for the competencies and life-skills that they know it is their responsibility to instill. The passion of these individuals is as admirable as the need to support them is persuasive.

It is encouraging to learn that after many difficult years struggling with very few resources and a true marathon of report writing, lobbying activities and mobilization, school libraries in Québec now benefit from a ten-year program for their development. As the Ministère de l'Éducation, du Loisir et du Sport (MELS) advocates:

The library is an essential place at the heart of the school to ensure the quality of educational services, as much in preschool learning or in primary and secondary teaching as in continuing education. However, in order for this service of support for using the documentary resources

of the school library to be able to play its role at the heart of the four interrelated educational service programs formulated by school boards, it is necessary to bring together three essential conditions. They are: a well organized school library with a rich and varied collection, competent personnel, and actions planned in concert with different levels of academic staff.

The Minister of Education, Leisure and Sport will continue the reinvestment in school libraries that began in 2004-2005 by contributing financially to the acquisition of new resources, and will permit school boards to hire 20 librarians per year for 10 years, to reach a total of 200 new librarians. (<http://www.mels.gouv.qc.ca/dossiers-thematiques/lecture-a-lecole/ressources-humaines-en-bibliotheconomie/>)

These librarians are practicing in schools and school boards for the benefit of teachers and students. Many of them are engaged in bringing together the different stakeholders and actors of the ebook chain to provide their students with access to ebook collections. Currently, ebooks, particularly in French, are found illegally in schools. Publishers are not yet offering licenses for school libraries.

The Québec librarian-hiring program is part of a larger plan Plan d'action pour la lecture à l'école (Action Plan for Reading at School). In order to generate interest among student librarians in training, the Québec MELS established a partnership with the École de bibliothéconomie et des sciences de l'information (EBSI) of the Université de Montréal to support school library-related courses. So far, school boards in the Montréal and Québec areas have received their share of school librarians. As anticipated, positions are more difficult to fill in the rural areas. To address this situation, the MELS asked the Université de Montréal to develop and offer six e-learning courses to facilitate completion of the program by students from rural regions. All graduates find posts as school librarians. Indeed searches for school librarians sometimes fail due to the lack of candidates with an MLIS degree. Discussions are already underway to pursue the program after 2014-2015.

In various consultations across the country we were introduced to the concept of the school-house public library, a facility usually within or attached to a school that serves also as a public library for the community. This represents a compromise for both library sectors but in the rural or remote areas where they are most prevalent we observed their success. For example, Brian Dawson of the Public Library Services office in Hay River, who participated at the consultation in



When children are introduced to libraries during their primary and secondary school years, they are better prepared for their futures in post-secondary, corporate, and life-long learning contexts.

Yellowknife, provided a personal perspective about the importance and essential pragmatism of utilizing this model in communities that could afford neither public nor school collections. In Alberta there were many communities satisfied with the school-house public library arrangement. Confluence Campus in Rocky Mountain House is an exemplary purpose-designed and -built facility established through partnership between the satellite campus of Red Deer College and the West Central and St. Dominic High Schools. Under contract with the school boards, the College manages the Library for the benefit of college and high school students alike. There are similar arrangements in British Columbia.

Whatever the model, we are convinced from the evidence that the culture of learning, to say nothing about enhanced literacy and other cognitive competencies, is profoundly and positively affected by the school library experience, most especially if that experience is delivered by a credentialed and well-prepared professional librarian or teacher-librarian. Moreover, when children are introduced to libraries during their primary and secondary school years, they are better prepared for their futures in post-secondary, corporate, and life-long learning contexts. In short, we are aligned with associations such as OLA, CLA and APSDS in making school libraries/learning commons the Canadian library priority of the moment.

Recommendations

THE PANEL RECOMMENDS THAT:

52. the *Council of Ministers of Education Canada* (CMEC) commission a pan-Canadian assessment engaging the full range of stakeholders, to bring forward a clear and prescriptive set of directives to frame a national policy consensus on the most appropriate model for school libraries/learning commons to maximize their contribution to the K-12 experience and its learning outcomes.
53. Ministries of Education work with Boards of Education and their respective schools to provide the sustainable funding necessary to realize the development of school libraries/learning commons.
54. Faculties of Education in universities with teacher-librarian programs or library and information studies (LIS) programs be funded to increase the number of graduates who would have the proper competencies to manage the new school library/learning commons.

55. provincial and territorial ministers responsible for public libraries and ministers of education join together to develop provincial standards that would direct the development of a school-house public library model drawing inspiration from the best practices and successes of those currently in operation.



These sketches of elementary and secondary students blend fiction and fact; what links them is the reality that the potential for both boys is not being realized.

James

Eight-year-old James lives with his parents, older sister and younger brother in Edmonton. Mother and father are social workers. His sister Cherie has started junior high and is dating her first boyfriend. His brother Matt is autistic. Speech pathologists, physiotherapists, and behavioural psychologists regularly visit their home. James wonders about the differences between him and his siblings, especially Matt.

His parents read the local daily, *The New York Times*, and *The Guardian* online. James and Cherie have their own cell phones and iPads. They share a laptop that their parents monitor. On the days when Matt is able to attend his special needs class, James walks with him to school, five blocks away. Their elementary school has a computer lab and a well-equipped library connected in the same space, but no teacher-librarian. Matt's class, which is located in a special zone of the school, has very little time in the library or the lab in contrast to James's class.

Each Saturday one parent drives the brothers to the local public library branch. Matt is especially excited by these visits; the librarians greet him by name and already set aside books they think he will enjoy.

He loves pictures and stories of robots and likes to regale his brother with accounts of what the robots can and will be able to do. James is at ease on the keyboard and finds his own selection of ebooks about his favourite topics –mystery and fantasy adventure. The librarians recognize that he reads stories beyond his age; he has devoured the seven *Harry Potter* books and is starting to work his way through Kevin

Major titles. Their visits usually coincide with a storytelling circle, and James is often encouraged to talk about a book he had chosen to read and why he liked it. The librarian suggests that they visit the makerspace at the downtown main branch.

The time in the Milner Library is an eye-opener for both James and Matt. Seeing the Lego robot created by an eleven-year-old and his father excites James so much that he gives it a name and insists that James hear his account of what “Chester” can do. When the librarians, who “speak geek,” direct the boys’ attention to the Espresso Book Machine and the 3-D printer, an idea forms in James’ mind. They submit a request to have the printer create a duplicate of Matt’s favourite small toy robot, which he always carries in his pocket as a kind of good luck charm. The brothers will return in a couple of weeks to retrieve the new object. They plan to use it to illustrate the story they are now writing together with Matt dictating the storyline and James keyboarding as they go. When they return to the Milner Library they will use the Espresso book machine to create their own book, a joint effort that will impress their parents and teachers. James hopes that the Espresso book will prompt Matt’s teachers to take his class to the library more often and even organize a bus trip downtown.

James also hopes that Matt’s class will have more opportunities to visit the school library and lab, to experiment with the possibilities of the keyboard and different screens allowing them to draw and colour online. He knows that Matt is not the only one in his class with keen digital coordination and a fascination with technology, which intrigues and calms him. Many others would benefit, he is sure. If a teacher-librarian were actually present, Matt and his classmates could be encouraged to move from screen to books and back again. He feels certain that his brother would learn to read more easily.

Jason

A member of the Ojibwa Matawa First Nation, seventeen-year-old Jason lives with his widowed mother and four younger siblings on the Long Lake #58 Reserve in the Municipality of Greenstone in northern

Ontario. His father was killed two years ago in a lumber mill accident. Both sets of grandparents live on the reserve, and he loves to listen to their stories about hunting and trapping in the early days.

Good at Math and Language Arts, Jason is a promising student at Migizi Miigwanan Eagle Feathers Secondary School, a new construction on the reserve. He has dreams of attending Confederation College in Thunder Bay and, possibly, continuing to university at either Lakehead or a school in the south. His uncle, a trucker, tells him with a note of caution in his voice, that Toronto is a 14-hour journey. In light of the mounting interest in Ring of Fire mining development in the area, he is being prompted to consider a career in metallurgical engineering. He gets most encouragement from his teachers and principal and from his mother, who sees him as the model example for the family. He would be their first college graduate. This responsibility weighs heavily on him.

The search for information about options for his career – and he considers the word itself fancy and high-toned – is limited to the advice of English and Science teachers. There is no library in either the secondary or the elementary school, but one is under construction to serve both schools by 2015. There is one mobile computer lab in Jason's school, but students do not have either laptops or iPads. There is no public library on the reserve, no bookmobile visits, and limited bandwidth means that ebooks are not available. In the nearby town of Longlac all users must pay a membership fee. The public library in Geraldton is 35 km away; Jason's mother has to rely on the loan of her brother's truck to take the children into the town. The public libraries in Thunder Bay are about 360 km removed from Long Lake #58.

There is a television but no computer in Jason's home. He was fascinated by a recent TV news item about a series of libraries started on reserves in British Columbia, and especially the architectural plans for the longhouse design of the newest building at Kitimat. A recruitment officer from Confederation College has visited Migizi Miigwanan Secondary to talk to the seniors. Jason has had a long conversation with her, and she is promising to send him scholarship applications. He has heard about transition-year programs for Aboriginal students at several universities. The principal is arranging for

another visit from a representative of the Aboriginal Studies program at Conestoga College in Kitchener. His Social Studies teacher recently told his class about successful Aboriginal programs in other parts of Canada. Jason was especially interested to learn of the Resource Centre at Red Crow Community College in Cardston, Alberta. A long way from home, but a facility he wishes he had access to consult! He learned that the Centre has over 15,000 books, access to over 10,000 ebooks, and scores of electronic databases. He wonders why the First Nations Adult and Higher Education Consortium of Tribal College Libraries isn't more prominent in his isolated part of the country.

Jason considers himself straddling two worlds: the stories of his grandparents, their attachment to the land and the gifts of the Creator, and the expectations for his future instilled by his teachers and mother. He feels a sense of loyalty to both. So far he has resisted the lure of drugs; seeing his friends trying to recover in methadone treatment programs is enough of a deterrent. But he remains hungry for information about the likelihood of bridging the values of the Matawa Nation and his family with yet-to-be-discovered opportunities.

K. Cultural Spaces and Voice

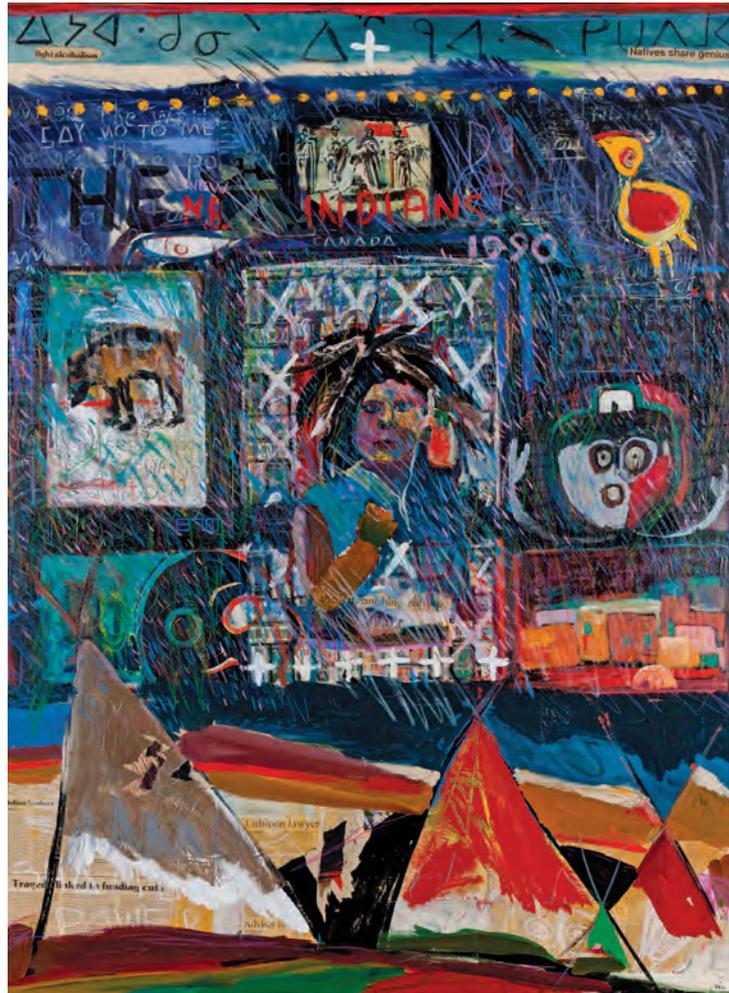
MUSEUM CURATOR and panel member Gerald McMaster has reminded us that libraries and archives are living spaces. He offers a view of the institutions we are analyzing and documenting from the vantage point of museums.

As a museum curator, it's the content within libraries and archives that interests me the most. The books and other material, this is the stuff that tells us who we are, it tells us our history, it tells us who we are. But, it just sits there, lifeless, waiting, of course, for someone to come along to interact with it, someone to bring it all to life, to treat it as if it were living, to give it voice.

Some libraries, he admits, lack a heartbeat and a voice:

I still hold onto a nostalgic view of libraries, especially in their design, the long smooth wooden tables and uncomfortable chairs; it's a view I surely share with others. I still see these kinds of buildings around,

Jane Ash Poitras
**Legacy of a
Liberated Culture**
mixed media, collage,
oil, acrylic, paper, plastic
on canvas
152.3 x 111.8 cm
Collection of the Alberta
Foundation for the Arts



though I can almost hear the discouraging word: This library should be in a museum! As a museum curator I guess I wouldn't mind it at all.

In keeping with the whole emphasis of our work as a Panel, McMaster contributes to the challenge of interpreting cultural institutions as living spaces. Despite the fact that libraries and archives house historical collections, it is their usage in the present that has efficacy. Libraries and archives, like museums, are always going to have and rely on their collections. It is at the programmatic level that new thinking can - and needs - to be brought to bear. Museums have begun to discover that to be relevant they need to be contemporary with the times, and not just through using new technologies, but with programs that ask thought-provoking questions and that engage with various publics through new methodologies of interpretation. Curators are also beginning to realize the importance of the shifting voices of authority that now include multivocal

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perspectives. The all-knowing curator is a modernist view, which is to say, a twentieth-century way of thinking; now exhibitions incorporate many voices, many views, or perspectives. This perspectival adjustment in art galleries and museums is radical, yet it is working especially in the programmatic aspects that influence and attract users.

Very much like museums and galleries, the dated view of libraries and archives sees them as places for books and historical materials, repositories for old things. But the reality is that these places are changing due to public demand or political pressures to rethink such institutions not only because of dwindling dollars but also because of enlarged perspectives. Now, we perceive these spaces as much more, or at least we are beginning to envision them as moving towards new levels of possibility. Indeed we have moved on from a time when everything was boxed within discrete disciplinary boundaries to one that might be thought of as messy and unruly, but exciting! We are now in a new digital age, one that is much more complex, multivocal, multiperspectival, multi- and inter-disciplinary.

The place of Indigenous cultures in Canada's museums, archives, and libraries and the services these institutions offer to Indigenous users concern every member of our Panel. The state of relations between museums and Indigenous cultures today is changing. Since the 1960s Indigenous peoples across the country have been working at various forms of cultural and historical recovery, some by building their own museums and cultural centres, while others are working with existing institutions locally, nationally, and internationally.

Some commentators have referred to this moment as a "renaissance," a term Gerald McMaster regards as misleading or unsuitable for describing such an epistemic shift. The term, whether used in upper or lower case, still does not take into consideration the odds against which Indigenous peoples were making strides in the process. Like the terms modern, modernity, or modernism, the designations are not only European, they describe a process of choice, a process that is a normal part of transition that has agency very much in its vocabulary. By contrast, Indigenous peoples had very little choice – if any – under the weight of colonization. The slow recovery has taken decades of struggle for equality, and involved the use of various strategies, from protest to education. The many entanglements with all aspects of Canadian society, Indigenous and non-Indigenous, from past to present, express who we all are as Canadians. Even though a renaissance can emerge out of struggle, what most characterizes the Indigenous situation is what Gerald Vizenor calls "survivance," which succinctly suggests the struggle for visibility (presence) in the face of invisibility (absence),

A living voice
is an act of
survival insofar
as it addresses
Indigenous
communities.

as a way to counter dominance and to subvert the position of victimhood. It is this presence or visibility, combined with the idea of voice that needs to be underscored in this discussion.

A living voice is an act of survival insofar as it addresses Indigenous communities. McMaster presents this account as an instructive prompt for thinking about voice in these institutions.

A number of years ago I wrote an essay called “Object (to) Sanctity,” in which I spoke about the differing views of objects, specifically how Plains Cree epistemology viewed the world through a lens wherein everything was alive. It was also in this essay that I made mention of how our tribal elders understood the need not to repatriate sacred or sensitive objects back to their communities of origin, for the simple reason that they no longer knew the language with which to communicate; thus, and until such a language or key was found to unlock the doors that have been closed for so long, they would not see their return.

After working in museums for many years I saw how disconnected everything in collections were from source communities, for I saw how the colonial process had driven a stake into the heart of all Indigenous cultures. In the late nineteenth century an American army officer Lt. Col. William Pratt was once quoted as saying, “kill the Indian and save the man.” This infamous utterance came to characterize the condition museums would become in the twentieth century. The Indian through government action was intellectually, spiritually, politically, linguistically, and physically killed; in turn, all his/her useless material culture was then placed in museums or private collections, to become completely disconnected.

When I thought the keys would never be found, I came across a story of a basket maker who taught a class of non-Indigenous students by carefully showing them various processes through the singing of songs; after several days or weeks one brave student asked when they would be making baskets. The teacher replied that indeed they were making baskets, in that the songs they were singing were baskets made visual. This story said to me that all the baskets in museums were not that important, so long as the songs were being sung, for the basket makers could go on making many more baskets without fear.

Whereas one elder said we needed to find the keys, another was using the keys. I now understood that the gap between the many objects in museums and contemporary Indigenous cultures could only be closed through thinking in new ways, and furthermore, that the objects in museums could be given new life (new subjecthood) if they were treated as living voices.

Recommendations

THE PANEL RECOMMENDS THAT:

56. the librarians and archivists in the First Nations and Aboriginal Heritage divisions of LAC in collaboration with ACA, CAA, and AAQ engage in plans with the First Nations University of Canada to draft an introductory program of Indigenous Archival Studies to be offered in communities and reserves across Canada.
57. LAC in collaboration with ACA, CCA, and AAQ and the charitable program Indspire establish a volunteer mentoring program involving archivists and Aboriginal youth to promote the creation of family archives.

See related recommendations in the Archives and Community section above.

L. Education of Librarians and Archivists and Professional Development

AMONG THE MANY IMPRESSIVE SUBMISSIONS to the Panel was a cogently argued 27-page document from l'Association des étudiantes et étudiants de l'École de bibliothéconomie et des sciences de l'information (EBSI) de l'Université de Montréal, which offered evidence of a dynamic, new generation of scholars, fully aware of and eager to exploit opportunities, undaunted by obstacles, and keen to revitalize practice. Examining both what is available and what is lacking, their fifteen recommendations point to the need for courses in new media and new publics, interdisciplinary approaches to leadership and management, computing, communication and design, and the inculcation of common values among information professionals. Their generous offering and suggestions echo in our remarks about current practice in library and archive sciences programs and

continuing education. Similar sentiments were expressed by polled participants attending the latest Northern Exposure to Leadership Institutes week-long leadership development experiences designed for recent LIS graduates who were identified as having leadership potential and nominated by their employing institutions.

Named libraries employ a considerable number of professional librarians, and for the most part those who enter one of the eight accredited graduate programs in Canada (holding as a minimum a baccalaureate degree), exit with a Master of Library and Information Studies (MLIS), or equivalent, and hold expectations of employment in a traditional library context. Universities offering these MLIS degrees include the University of Alberta, the University of British Columbia, Dalhousie University, the University of Ottawa, the University of Toronto, Western University, McGill University, and the Université de Montréal. The accrediting agency is the Committee on Accreditation of the *American Library Association* (COA/ALA) which accredits 63 programs across North America; the process of accreditation is extensive and provides the degree-holder with a professional legitimacy that is recognized throughout the world.

Competencies acquired while in an MLIS program have become increasingly valued as corporations, organizations, and institutions have realized the crucial importance of information technologies. We note that new job titles have begun to emerge in non-library organizations and corporations, often combined with new physical settings and sometimes no physical setting at all. Titles such as Information Architect, Information Officer, Knowledge Manager, and Documentalist represent only a few, with practitioners labouring in venues such as Information Centers, Documentation Centers, Resource Centers, Learning/Information or Knowledge Commons, among many others. Thus, not all librarians work in libraries, but they do use their competencies in a variety of cognate settings.

Recognizing the market for graduates had changed, if not expanded, a number of the Library Schools transformed to become Information Schools, or ischools, retaining the MLIS as a program but not a sole purpose, and offering additional degrees such as a Master of Information. In Canada, the University of British Columbia and the University of Toronto have rebranded in such fashion, and several others claim a similar refocusing of their curricula without a rebranding of their program. The ischool curricula purport to take a more interdisciplinary approach to the interplay among people, information, and technology. Degrees awarded from these institutions, other than the MLIS, are not accredited by ALA.

Graduates, however, still look for opportunities within traditional libraries as well as those in other sectors, and often face credentialing issues as institutional human resource policies have embedded the MLIS as a required qualification for positions designated as librarian.

Not all who work in libraries are librarians, although this is not always evident to the public. Canadian libraries are diverse. Many libraries in rural, hamlet, or small town settings do not employ professional librarians, as would also be the case in many special libraries. Yet, managerial oversight of these libraries may well be vested in someone designated as a librarian by the host authority. Many of these institutions or organizations employ library technicians. Technicians are graduates from one of Canada's 18 two-year college programs (requiring a minimum of high school completion for entry). Library technicians are also employed extensively in larger public, college, and university libraries performing a variety of essential library support functions. In school settings they work together with, or as replacement for, teacher-librarians.

There is no dedicated accrediting mechanism for archivists, although COA/ALA accreditation recognizes and evaluates archival components in librarianship programs. Archival education programs have developed considerably in the past half-century. Historically, archival training was through institution-based apprenticeships, often punctuated by short and more formal courses. As recently as the 1970s the previous Public Archives of Canada provided summer courses to develop skill sets and competencies. Schools of Library and Information Studies (LIS) both formerly and today offer courses and programs in archival studies/records management and are often the only formal education leading to practice. We recognize that today's programs are more mature and systematized, blending the professional and technical elements of practice. While most LIS programs still offer courses or programs in the discipline, the iSchool at the University of British Columbia, School of Library, Archival & Information Studies, offers a focused Master of Archival Studies degree, while l'École de bibliothéconomie et des sciences de l'information at l'Université de Montréal offers focused PhD and Master of Archival Studies Degrees, as well as a Certificat en archivistique and a Certificat en gestion de l'information. The University of Manitoba's Department of History offers an alternate route to practice with its Master of Arts program in Archival Studies, as do both the Département des sciences historiques de l'Université Laval, which offers both PhD and Master degrees in Archival Studies and the Université du Québec à Montréal with its Certificat en gestion des documents et des archives

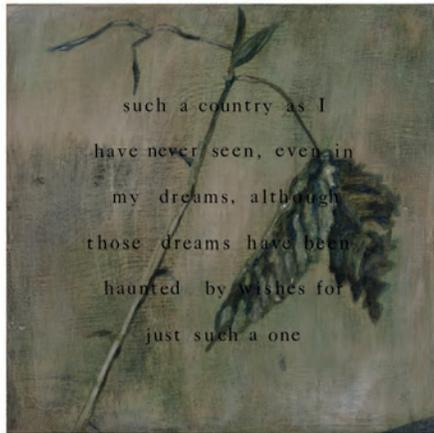
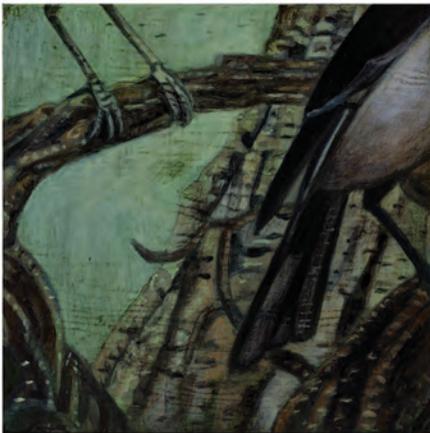
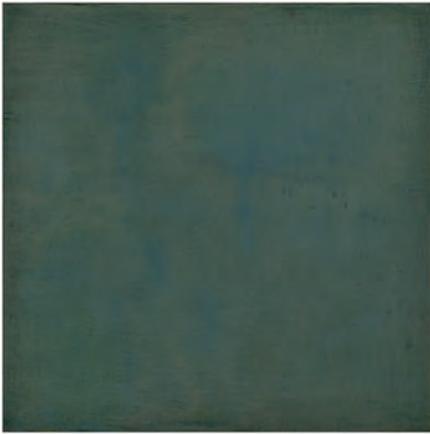
MLIS programs need to better prepare graduates for the realities of the current information environment.

offered through the Département d'histoire. Technical training programs are also offered through Algonquin College and George Brown College.

The rapid changes to the library and archival communities in the past few years reflect those in professional practice. We heard recent graduates of the library and schools openly questioning the relevance of their preparation as they embark upon their careers and as they come to appreciate the current expectations of employers. Employers also question the preparation of their new employees. Some lament the inadequacy of preparation in traditional skills (organization of knowledge, reference and information services, etc.); others seek more attention to user services (children librarianship, young adult services, community development, etc.); and still others believe the focus should be on emerging digital technologies and related services. In addition to these perspectives was the issue of the leadership deficit; the submission from CLA President DeYoung expressed a universal employer theme, the “ need for librarians skilled in performing managerial functions and able to assume leadership roles.” For CARL President Beasley the issue was the relevance and currency of skills: “Professional librarian and archivist training needs to be reviewed regularly in order to ensure relevant skills are being taught. MLIS programs need to better prepare graduates for the realities of the current information environment . . . [and] Library education in Canada might benefit from closer ties between library schools and research libraries.” Neither graduate nor employer group appears content, but their concerns need to be understood against the struggle of MLIS programs to meet core curriculum requirements mandated by accreditation with available teaching resources.

Practitioners regret that faculty members seem disengaged from professional conferences, workshops, and institutes. We found some irony in this; because school faculty are rewarded for the dissemination of their research and scholarship, they tend to prefer, and indeed in some cases are encouraged or advantaged, to publish for their peers and not practitioners. Practitioners might access the published literature from these researchers if it is readily available to them. Good research does inform good service but research results often appear in publications that are difficult to access due to publishing practice and licensing protocols. As a result, when those in practice have opportunities to share their service experiences, they often do this without benefit of familiarity with relevant scholarship.

If one element of a profession is the mastery of a complex body of knowledge and proficiency in associated skills, it is vital that professional practitioners,



Amy Gogarty
**The Order of
Passeriformes**, 1991
acrylic, lettraset on plywood
110.5 x 111.5 cm
Collection of the Alberta
Foundation for the Arts

Appropriate professional preparation and lifelong professional development are essential to the quality and the dependability of the services provided and collections assembled.

assisted by employers, regularly refresh the knowledge base and keep those skills current. Appropriate professional preparation and lifelong professional development are essential to the quality and the dependability of the services provided and collections assembled. Indeed, we have learned there is a genuine desire for professional development programming, with the evolving technologies of enhanced online learning and MOOCs as vehicles for greater access. Lisa Hardy expressed the pressing need in rural communities for “opportunities for current professionals to build upon their skills to meet the challenges.” Dolores Harms Penner echoed the same from the perspective of library technicians and other library workers. The submission from SOLS pragmatically noted that “library staff [need] an unprecedented multitude of skills and abilities. Thus the conversation needs to be about which training requirements will fall to the employers and/or professional associations.” And again from SOLS we heard the plea for “leaders and ambassadors who are skilled at collaborating, influencing, generating enthusiasm, [and] cultivating commitment.” Greater access to leadership programs was often mentioned, with recent evidence suggesting an emphasis on immersive and personal learning experiences in controlled settings.

Responsibility in these matters rests jointly with the individual and the employer, but access to rich and diverse programming is clearly required. Only some schools offer structured but limited continuing studies. The iSchool at UBC has a Certificate of Advanced Study that designs programs specifically for practitioners with post-graduate degrees; the iSchool at the University of Toronto in partnership with the University’s School of Continuing Studies will soon launch a new program of developmental programming. These tend to be regional and of limited coverage overall. All the provincial and some national associations/councils have professional development programs, organize conferences, and provide networking opportunities for their members. All provincial library associations participate in *The Partnership*, which collaboratively acquires and creates programs, primarily web sessions intended for the advancement of practitioners and institutions within the entire ecosystem. *The Partnership* is also currently piloting a Continuing Education Certificate that aims to systematize and aggregate individual developmental experiences into a credentialing experience. Nationally, ACA has a healthy range of professional development programs; CLA has an annual conference. The nine professional associations representing librarians, archivists, and library technicians in Québec also organize an annual conference, the “Congrès des milieux documentaires” held each year at the Palais des congrès in Montréal.

Whether librarians or library workers, whether archivists or archival workers, all need professional development programs and in-service training. The average per capita expenditure for such programs for library and archival staff is considerably less than for other sectors, like fields related to information technology. In our view, more responsibility for development and training must rest with employers. Whether the programming originates from universities, colleges or professional associations/organizations, there is need of a constant critical mass for programs to be created and to continually evolve. While individuals should contribute to their personal professional growth, institutions and corporations must recognize the new reality of substantial investment in their people. The constant retooling and rejuvenation of human resource assets must become a focus for the sector.

Recommendations

THE PANEL RECOMMENDS THAT:

- 58.** provosts at the eight universities hosting library schools or ischools embark upon a system-wide review of their programs in partnership with professionals in practice, and particularly employers, to refine mandates, reduce unnecessary program overlaps, exploit technology to achieve efficiencies and, assess the efficacy of program outcomes by way of a thorough review of course syllabi.
- 59.** deans and directors of graduate library schools, ischools, and archival programs, working with the appropriate provincial associations conceive and implement systematic library and archival pan-Canadian mid-career certification programs to ensure that all Canadians are served by the most knowledgeable and current library and archival practitioners.
- 60.** provincial/territorial library and archival associations/councils develop their professional development curricula by way of engagement with their respective audiences – both practitioners and employers.
- 61.** while practitioners must recognize their responsibility for their own development, employers must invest significantly more financial resources in the development of their staff.

62. library and archival institutions and professional communities identify their emerging leaders and make sure they have access to leadership development programs.

See related recommendations in the Analogue Cultural Patrimony section above.

M. Copyright and Canadian Libraries and Archives in the Digital Environment

MY VISION OF FUTURE LIBRARIES focuses on the things we can do better than Google/Apple/ Microsoft. Being a real third space: a community and learning space where people interact and discover. Being an expert space where skillful staff know the subjects and their clients, and have relationships with the communities they serve. Being an intermediary space that recognizes that often research and researchers are complex, and maybe there is work to do before we have a question to ask SIRI. Books, journals, data, information, etc. will always be part of what we do, but it is what we do with it that helps make it all useful.

— **David H. Michels** MA, MLIS, PhD (candidate), Public Services Librarian, Sir James Dunn Law Library, Dalhousie University, as posted on the APLA listserv, January 14, 2014

A digital population cannot be well served by an analog archive.

— **Jonathan Dorey**, McGill PhD student, at the Archives Summit

One of the large challenges Canada's libraries and archives face is navigating a course between technological enablement and legal permission. Digital resources have their fragilities that make the preservation task as important as ever. But how this task is to be performed and how these resources are to be communicated and shared require new competencies and outlooks. Buildings and budgets remain intensely local, but the internet enables institutions to share resources – both information resources and also staff time and skills – in completely new ways.

Libraries and archives have been involved with, and have been regulated by, copyright law since England enacted the first copyright law in 1710. In its earliest

Copyright law is integral to users' relationship with libraries and archives because it affects or controls what materials they may access through a library or archive and what they may do with such materials.

years, copyright was primarily a trade regulation for publishers, with libraries as the incidental beneficiaries because publishers were required to deposit copies of their books with libraries in order to obtain copyright. Over time, copyright has expanded its role in regulating the cultural sectors and the knowledge economy. Copyright covers all works of authorship, whether published or unpublished, for a period usually measured by the life of the author plus fifty years. Digital technologies potentially empower libraries, archives, and their users to engage in a range of activities that copyright regulates, such as making and distributing copies, streaming or otherwise communicating works to the public, and translating, sampling, mashing up, or otherwise adapting copyrighted works.

Copyright law is integral to users' relationship with libraries and archives because it affects or controls what materials they may access through a library or archive and what they may do with such materials. The digital transition complicates copyright's role in these relationships. Libraries and archives confront copyright questions both when they acquire resources and when they make these available directly to their users or to other libraries and archives. Other sources of legal constraint on use, particularly for archives, come from donor agreements and privacy regulations. But, copyright is the most general and pervasive legal constraint on use. Although not visible to users, copyright creates a decision tree that librarians and archivists must follow when they acquire, use, or make public information resources ranging from unpublished letters and photographs, primarily in archives, to recently published literature, non-fiction, music, film, and most any other information resource.

Some restrictions on unlicensed use of copyrighted information are inevitable. But, copyright law supplies users with certain rights to use works still under copyright without a license, and some of these user rights are tailored specifically for libraries and archives. In the digital age, it is of paramount importance that these institutions weave these user rights into their daily operations with respect to private copies or digitization projects. User needs and expectations will put mounting pressure on traditional library licensing practices that result in differential access across Canada to digital resources potentially accessible over the Internet. Although some helpful forms of cooperation through library consortia and other means have emerged, copyright law and licensing will deeply influence decisions about resource sharing because of the ways in which copyright treats digital information.

The decision tree that librarians and archivists must follow when contemplating an acquisition or use of information resources is this:

1. Is this resource under and regulated by copyright?
2. If so, is this use already permitted by law, such as fair dealing?
3. If not, from whom may we obtain permission or a license for the use and under what terms?

Resources Subject to Copyright

MOST INFORMATION RESOURCES to which libraries and archives provide access are still in-copyright. Copyright applies to every “original literary, dramatic, musical and artistic work” produced by an author in most countries in the world because of Canada’s treaty relationships. Certain informational resources, such as factual research data that do not have original expression in their selection or arrangement, may not qualify for copyright protection. Otherwise, almost all the holdings of libraries and archives received copyright protection when they were created. Researchers and some archivists are surprised to learn that automatic copyright means that even the expressive ephemera of family life, such as notes, diary entries, sketches and the like are all in copyright. With respect to photographs, it should be noted that copyright belongs to the photographer rather than the subject of the photograph.

Since copyright in these resources lasts for the life of the author plus fifty years, most resources created in the mid- to latter-twentieth century remain under copyright. Special rules apply to anonymous or pseudonymous works and those that are published posthumously.

Uses Regulated by Copyright

RECENT TECHNOLOGICAL AND LEGAL CHANGES will require libraries and archives to adjust some of their practices concerning copyright. Generally, to determine whether copyright permission is required for a contemplated activity, a librarian or archivist first considers whether s/he is reproducing, publishing, performing, or adapting the work of authorship. Copying must not be of the full work or “any substantial part” of the work. Common activities such as making preservation copies, or copies for digital download, do fall within the activities that copyright covers.

Rights of Copyright Owners and Users

IN 1997, the Copyright Act was amended to provide specific user rights, for libraries, archives, and museums, and for educational institutions. These uses, such as making a preservation copy or providing an analogue copy for InterLibrary loan, are defined relatively narrowly and are not particularly useful for digital information. Some institutions took a narrow view of these permissions and paid Access Copyright or Copibec for reprographic licenses to cover digital ILLs.

Fair dealing allows libraries and archives some latitude in using copyrighted works on their own account or on behalf of their users. As the Supreme Court of Canada has explained:

The fair dealing exception like other exceptions in the Copyright Act, is a user's right. In order to maintain the proper balance between the rights of a copyright owner and user's interest, it must not be interpreted restrictively. (CCH Canadian Ltd. V. Law Society of Upper Canada, [2004] S.C.R., Para 48. Citation omitted)

In 2004, the Court relied on fair dealing in allowing a library to provide a photocopy service and a self-service photocopier for patrons, and to fax copies of materials to patrons. The Court held that these were permitted activities, reminding us that:

As an integral part of the scheme of copyright law, the s.29 fair dealing exception is always available. Simply put, a library can always attempt to prove that its dealings with a copyrighted work are fair under s.29 of the Copyright Act. (CCH Canadian Ltd. V. Law Society of Upper Canada, [2004] S.C.R., Para 49 [Can.])

Fair dealing is generally understood as a two-step consideration. First, one determines whether a use can fairly be characterized as research, private study, education, parody, satire, criticism, review, or news reporting. If it can, then the dealing is fair if the balance of the following factors favours the use: (1) the purpose of the dealing, (2) the character of the dealing, (3) the amount of the dealing, (4) the alternatives to the dealing, (5) the nature of the work in question, or (6) the effect of the dealing on that work. And in the case of criticism, review, or news reporting, whether proper attribution has been given.

The important development in Canadian jurisprudence established first in 2004 and then strongly confirmed in a group of judgments in 2012 (the "Copyright Pentalogy") is that the Court gave a capacious reading to the categories of uses

that may be considered fair dealing, in particular “research” and “private study.” In the words of the Court, its earlier decision provided “a generous interpretation of the fair dealing purposes.” In most cases, therefore, librarians and archivists need not be concerned that fair dealing is categorically off limits.

For example, private study is not limited to uses done alone. Establishing that teachers may make multiple copies of a work for the benefit of their students, the Court explained that “[t]he word ‘private’ in ‘private study’ should not be understood as requiring users to view copyrighted works in splendid isolation. Studying and learning are essentially personal endeavors whether they are engaged in with others or in solitude” (Alberta [Education] v. Canadian Copyright Licensing Agency [2012] 2 S.C.R. 362, para. 27). The Court likewise gave a very broad reading to the “research” purpose of fair dealing when it concluded that research can be undertaken for personal interest or any “piecemeal, informal, exploratory, or confirmatory” purposes (SOCAN v. Bell Canada [2012] 2 S.C.R. 326, 336, para 22 [Can.]). These judgments, combined with the rule that libraries may make a use of a copyrighted work on behalf of a user if the use would qualify as fair dealing increases the space in which libraries and archives can operate with copyrighted works.

This liberating development has come at an opportune time because new technologies such as 3D printing and other forms of digital reproduction and manipulation enable a wide range of uses not captured by the specific library, archive, and museum provisions of the Act. In a large range of cases, fair dealing will provide a legal basis for libraries and archives to shift older analogue works into a digital format for purposes such as research and private study, even when digitization is done at the collection level. While archivists may have constraints imposed by donor agreements or privacy concerns on making unpublished correspondence available, in the years ahead, libraries and archives will need to make fair dealing judgments about the information resources they hold in a range of interesting use cases that new technologies will bring forth.

From Analogue to Digital and the Rise of Licensing

THE SHIFT FROM ANALOGUE TO DIGITAL PUBLISHING has the potential unintended consequence of shifting the balance of rights between copyright owners and users. This has occurred because of how copyright is defined and how digital technologies work. Copyright defines the owner’s rights in a work of authorship, through verbs such as to reproduce, to first publish, to distribute, or

Facing page:

Grey Nuns Reading
Room, Concordia
University
Québec

to communicate the work to the public. When one opens a book, one does not reproduce the text merely by reading it. However, when one opens a digital file or clicks on a link, one's computer necessarily makes a copy for purposes of making the text available for reading, and this copy may be of sufficiently stable form to count as a reproduction under the law.

The sharing of an analogue resource or a digital resource has different copyright implications for activities such as lending and ILL. Traditionally, when a library or archive acquired a literary work in printed or manuscript form, or a photograph, or any other copy of the work in analogue form, it owned that particular copy of the work. As the owner of such copy, it had the right to lend this copy to members of the public without payment to, or control by, the copyright owner. Recognizing that public lending may in some cases diminish book sales, Canada instituted in 1986 a Public Lending Right (PLR) Program. Rights-holders who register their titles with the PLR Commission become eligible for remuneration, but libraries and archives remain free to lend the physical copies that they hold.

When libraries acquire rights to access remote electronic databases or digital copies of ebooks, the role of copyright in public lending shifts. Publishers understandably take the position that they are licensing rather than selling electronic copies of their works because, in the digital environment, works cannot be enjoyed without being digitally reproduced, and these reproductions require a license. Libraries and archives must look to the terms of their copyright license rather than to the law to understand how many times or to whom they may lend an ebook or other electronic resource, whether it has been loaded onto an e-reader or is available for download from the library or archive's server. Many publishers supplement these license terms with technological protection measures (digital rights management) that use computer code to limit how the digital file may be accessed, transferred or used.

The publishers' position does not necessarily reflect Canadian law. For example, the recently introduced s. 30.71 provides that certain temporary copies made as part of a "technological process" are not subject to regulation by copyright. If reading a book digitally involves making a reproduction of the book's digital files, this reproduction may not be an infringement when its only purpose is to facilitate reading (a non-infringing activity), and to the extent that the reproduction exists only for the duration of the technological process that enables the reading.



Digital publishing dramatically reduces the cost of distributing (as opposed to acquiring, preparing, and editing) works of authorship.

The potential disconnect between what technology enables and how legal and business concerns restrict the realization of technology's potential to broaden access to information resources is likely to influence the future of Canada's libraries and archives. Two examples of how licensing limits potential beneficial uses of technology serve to illustrate the point.

First, digital publishing dramatically reduces the cost of distributing (as opposed to acquiring, preparing, and editing) works of authorship. Perfect copies can be rapidly made on demand and transported over the Internet or via physical transfer of media such as USB drives or optical disks. Theoretically, this ease of distribution ought to increase access to published works. However, as of the writing of this Report, many publishers remain reluctant to sell access to copies of ebooks to libraries out of concern for the market substitution effects of public lending. Libraries are ready, willing, and in many cases, able, to pay for copies of ebooks, even when the price is about eight times the consumer retail price. But some books are simply not for sale to libraries. Some major trade publishers have supported ebook lending from the beginning, and some signs of rapprochement between the publishing and library sectors are emerging. But this issue requires resolution for libraries to continue to provide their critical role in supplying access to knowledge in the digital era.

A second example of how law constrains productive uses of technology involves academic libraries and research. Like the rest of us, scholars face information overload as more books and articles in their fields are published each year than they could ever hope to read. Through text mining, computers may be able to help scientists, historians, and a range of other researchers find patterns in the literature that can improve their understanding of the current state of the field. But academic libraries that subscribe to the published scholarly literature are signing license agreements that prohibit researchers from downloading large segments of the literature in bulk for the purpose of computational analysis. This practice is slowing the pace of research and deserves close attention.

Collective societies have played an active role on behalf of groups of copyright owners to license particular kinds of uses with respect to particular kinds of works. There are approximately 35 such organizations in Canada.

To the extent that libraries or archives require a license from a collective society, a recent development affecting libraries in particular has been the ability of collective societies to offer tariffs filed with the Copyright Board. The types of libraries that can use content under the terms of the tariff have grown in recent years. In 2006, school libraries were covered by the tariff process. In

2010, government libraries and college and university libraries were added to this process. To date tariffs for reproducing literary works have targeted educational institutions as a whole, including their libraries. Public libraries and others not affiliated with an educational institution should monitor and be prepared to engage with this issue and in the tariffing process should Access Copyright and Copibec choose to pursue this avenue in the future.

Recommendations

THE PANEL RECOMMENDS THAT:

- 63.** libraries and archives make full use of their users' rights of fair dealing and the additional specific exceptions and limitations to copyright to engage in productive initiatives such as digitization of collections in analogue media, providing private study copies to patrons, and otherwise using the flexibility provided by the law as appropriate.
- 64.** libraries and archives continue to participate in proceedings before the Copyright Board to ensure that their positions are well represented.
- 65.** library licensing practices for electronic resources be revised. From a user's perspective, the Internet enables equal access to digital information wherever there is a connection. But, access to licensed electronic resources, including ebooks, varies greatly across Canada because licensing is still done at the local, or sometimes at the consortial, level. Greater institutional cooperation on licensing and hosting should be given high priority to equalize access to the resources by using cloud services or other shared Internet infrastructure.
- 66.** in discussions of how to adapt to the digital environment, concerns about increasing access are balanced with concerns about ensuring that creators of literary and artistic works are adequately compensated for their contribution to Canada's cultural legacy.

N. Libraries, Open Access, and Open Educational Resources

WHILE THE DIGITAL TRANSITION poses certain potential challenges, it also creates a range of possibilities that deeply reorient the relationship between libraries and copyrighted resources. Copyright is an author's right. Some authors of research and educational materials are choosing to use the Internet to share their work under copyright terms that invite broad access and reuse. Many researchers are providing access to research articles over the Internet either by publishing in open access journals or by archiving copies of their final manuscripts in their institutional repositories or personal websites to broaden the audience for their work. In a related vein, the movement for open educational resources (OERs) is gaining momentum. OERs are textbooks, supplementary materials, lesson plans, assessment tools, and related materials that are published online for free under a copyright license, such as a Creative Commons Attribution license, that permits broad reuse and adaptation. Libraries' role in the progress of these developments will continue to be essential.

Libraries have supplied much of the energy and organizational muscle needed to propel open access from an idea to an expectation. While still a relatively small part of the published research literature, open access publishing is quickly gaining traction as a growing number of established publishers are launching new open access journals or even acquiring open access publishers. Libraries in post-secondary educational institutions are faced with challenges to be creative and flexible with their budgets, which were once devoted primarily to collection development through subscriptions and monograph purchases. Now, libraries must also contemplate a role in supporting the open access publishing model through memberships or support for authors on their campuses and, increasingly, in providing publishing services for faculty or scholarly societies seeking to launch an open access journal.

This last development fits with the larger trend noted elsewhere in this Report of libraries transforming themselves from primarily sites of knowledge curation and discovery to sites of knowledge production and dissemination. Canadian research libraries have developed a range of new services to facilitate this transformation. These include software development, hosting, editorial services, and related support. All these services require substantial infrastructural and financial support from university administrations. For example, recognizing that information itself can be a form of infrastructure, the Public Knowledge

Libraries have supplied much of the energy and organizational muscle needed to propel open access from an idea to an expectation.

Universities are also experimenting with new forms of collaboration with their institutional repositories.

Project (PKP), a multi-university project based in the Simon Fraser University Library, developed and maintains free and open source software such as the popular Open Journal Systems and Open Monograph Press used to organize and manage the submission, review, and publication of scholarly research (<https://pkp.sfu.ca>). The project also provides a range of publishing services to support those using this software. The Érudit publishing platform, founded in 1998, hosts more than 120 journals with a commitment toward open access. While some journals are fully freely accessible, most articles published in the Érudit journals are disseminated for free two years after their publication dates. Érudit (www.erudit.org) is a multi-university consortium composed of Université de Montréal, Université Laval, and Université du Québec à Montréal.

The growth of institutional repositories, stand-alone or in partnership with other institutions, provides university libraries with the server space necessary to host scholarly publications along with supplementary information and research data. Such collections could be the genesis of a Canadian Repository in the cloud.

Library publishing services have expanded beyond scholarly journals to include open access scholarly monographs, particularly in the social sciences and the humanities. This is still a relatively new development, but it appears to be trending in a direction of further growth. For example, new presses are created, like the soon-to-be-launched Concordia University Press, which will publish peer-reviewed, open access scholarly books.

Universities are also experimenting with new forms of collaboration with their institutional repositories. The Synergies project represents a possible model for this kind of interaction (<http://www.synergiescanada.org/page/partners>). Aimed at bringing the social science and humanities journal literature online, Synergies aggregates the digital collections produced and hosted by five regional partners, Université de Montréal, University of New Brunswick, University of Toronto, University of Calgary, and Simon Fraser University.

Scholarly communication remains a complex and fragile ecology. While opportunities abound to grow library publishing services, university administrators should seize the advantage to better coordinate this growth by working in collaboration with each other and with the leadership in libraries and university presses. Identifying and allocating the resources to support a vibrant scholarly communication system, including support for scholarly meetings and other activities of scholarly societies, will require some changes in institutional arrangements, repurposing of some budgets, and identifying and realizing efficiencies enabled by digital technologies. Surveys of leadership at libraries and

university presses in both Canada and the United States reveal that many campus participants recognize these opportunities and challenges (Lorimer).

The role of libraries in supporting the production, dissemination, and discovery of open educational resources (OER) is at a relatively early stage of development. Supporting faculty in discovery and rights clearance to include materials in online courses is a longstanding service in academic libraries. But library publishing services could be extended to include production and hosting of open textbooks and supplementary materials, for example. Libraries also could facilitate the discovery of high quality openly licensed – and only openly licensed materials – by building and hosting collections of open materials. This is an activity not limited to academic librarians. Indeed, school librarians and public librarians have the opportunity to focus the attention of time-pressed teachers in primary and secondary school on the availability of open resources they can use themselves or direct their students to in the course of doing school projects. The possibilities are many, and librarians have a growing appetite to be more directly involved in open educational initiatives.

Recommendations

THE PANEL RECOMMENDS THAT:

67. librarians continue to educate faculty about managing their copyrights in scholarly articles and monographs to maximize the impact of their work by broadening access to it.
68. leaders of university administrations, libraries, and presses intensify efforts to rationalize the allocation of resources and realign incentives to ensure that scholarly publishing on campus is being done as efficiently and effectively as possible. Moreover, these leaders should explore more robust institutional cooperation to share the resources necessary to support vibrant and sustainable scholarly publishing. Particular regard should be given to supporting publishing in the social sciences and humanities, which do not receive as much government and private research support as the natural sciences for research and publication.

69. librarians with an interest in education, formal and informal, explore opportunities to participate in the growth of open educational resources by producing, or supporting faculty who produce, open course materials and open textbooks and by helping time-pressed educators or self-learners find high quality, relevant OER by building collections or discovery tools.



MENKÉS SHOONER DAGENAI
LETOURNEUX ARCHITECTS

Bibliothèque Paul-Mercier
Blainville, Québec

3 Recommendations



THE RECOMMENDATIONS cover a wide expanse of disciplinary territory and jurisdictions. With the support of the Royal Society of Canada the Panel plans to monitor progress and release an update reporting on changes within two to three years.

Library and Archives Canada/Bibliothèque et archives Canada

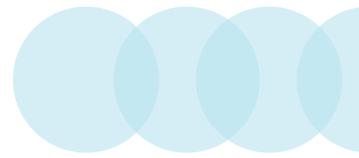
THE CONDITION AND FUTURE OF LAC were concerns voiced at every consultation and repeated themes in the submissions we received. A deeply felt sense of sadness and frustration pointed to issues involving communication, absenteeism on key boards, deterioration of internal morale, and international presence. The Panel believes that it will take time and strategic effort to rebuild trust among the professional and research communities in Canada and elsewhere. We are convinced that professional associations are eager to assist and facilitate such rebuilding of confidence and re-integration within Canada's diverse population. Timing and accountable, clear communication are vital elements of such a renewal.



IMAGE CREDIT

**Facing page
and page 186:**

Vancouver Public Library,
main branch
Vancouver,
British Columbia



THE PANEL RECOMMENDS THAT THE LIBRARIAN AND ARCHIVIST OF CANADA:

1. develop by July 1, 2015 or earlier, a five-year strategic plan, in consultation with all relevant stakeholders, to provide a clear path to meeting the goals articulated in Section 7 of the Library and Archives Act. *Inter alia* this plan must define the scope of the “documentary heritage” that LAC would commit to acquire and preserve, and would establish measurable benchmarks for LAC to “support the development of the library and archival communities.” Such a plan would also include plans for periodic evaluation of progress toward meeting these goals.
2. participate actively on the boards/councils of those associations in which LAC has membership – e.g. CARL, CULC, ACA/CCA/AAQ, etc. In addition, he should develop a schedule of initial engagement with all provincial and territorial associations/councils.
3. use whatever organizational means possible, including expert outside consultants on systemic human resource policies, to deal with the morale issues within LAC.
4. establish a special task force of key members within the library and archival communities, as well as key stakeholder communities such as the Canadian Historical Association (CHA), to assess, over a two-year period, the progress made in harmonizing cultures in LAC. At the end of the two years the task force will submit a report, with recommendations,

to the Minister of Canadian Heritage and Official Languages relating to the continuation of a merged institution.

5. participate actively in and reassert Canada's presence, with full support of the Minister of Canadian Heritage and Official Languages, in the international community of libraries and archives.
6. engage the Minister of Canadian Heritage and Official Languages, as well as officials in Canadian Heritage, Treasury Board of Canada, and other federal agencies as required to review and revise if necessary the enabling policies and protocols that inhibit the fulfillment of the LAC mandate as expressed in the Library and Archives Act (2004), and which seems to prevent LAC from performing at a level in keeping with the expectations of Canadians and the best practices of similarly situated national libraries and archives.

Library and Archival Associations

● ARCHIVAL ASSOCIATIONS

In reviewing the range of professional archival and library associations, the Panel suggests that value should result from membership. We believe that greater coordination is needed in addressing professional development, public awareness, and government relations. The benefit to Canadian society as a whole of enhanced, revitalized, integrated, and systematic awareness campaigns using a variety of media and venues would be immense. We identify the CCA, the organization charged to make the archival system function optimally, as the lead agent of these activities. We also indicate the responsibility of provincial ministries and archival networks to ensure appropriate funding. The beneficiaries will be the Canadian public, knowing and accessing their heritage, and proposing and implementing future strides.

THE PANEL RECOMMENDS THAT:

7. CCA initiate a dialogue with all the component organizations, including the ACA/AAQ, to discuss the ways and means to enhance the resources available for a vibrant, national awareness campaign intended to remind Canadians repeatedly of the importance and essential utility of archives in the life of the nation.

8. CCA review the accountability structures of the various elements of the archival system to ensure that on relevant national and international policy issues and particularly matters relating to the security of the national patrimony all components of the archival system are aligned and have no discordant voices.
9. the provincial ministries charged with responsibility for their provincial archives and by extension the provincial archival network review funding for the provincial network council/association to ensure that the necessary resources are in place to continue participation and reporting to ARCHIVESCANADA.ca.

● LIBRARY ASSOCIATIONS

In reviewing the situation within the national Anglophone library association, CLA, the Panel realized that a degree of organizational dissonance and a changing demographic preferring provincial or regional associations over the national body have resulted in declining memberships and as a result, CLA has been less effective as a library voice. We strongly support the initiatives for change and revitalization within CLA. To achieve greater and much-needed prominence and to ensure productive integration among related national, provincial, and territorial associations, we propose the concept of a federation. The lead and inaugurating agent will be CLA. The feasibility of integrated professional projects and increases in membership activity and interest are the forecasted results.

THE PANEL RECOMMENDS THAT:

10. CLA focus its activities in five areas: (1) continue to perform MLIS program accreditation as well as professional qualification adjudication in conjunction with the American Library Association; (2) undertake practice-focused, evidence-based market research (both self-initiated and contracted); (3) create a vibrant, national awareness campaign intended to alert and remind Canadians about the importance and essential utility of such capacities in the everyday life of the nation; (4) engage in federal government relations and the development of public policy; and, (5) promote and represent Canadian libraries and librarians internationally within the global community of libraries.

11. CLA reconceive itself as a federation of national provincial/territorial and other national associations (not unlike the network structure of the Canadian archival community). The Association would be guided by a defined Council which would have properties such as: *ex officio* status for all provincial/ territorial associations or an agreed-upon rotating subset of these associations; *ex officio* status for ASTED, CULC, CARL, and the *Provincial and Territorial Public Library Council* (PTPL) and observer status for such organizations as the ACA and the *Canadian Museums Association* (CMA).
12. the current Executive Council of CLA prepare an inaugural business plan to initiate the negotiation of a funding model leading to the approval of the above constituent associations, with the intention of introducing a compulsory and contractual levy to underwrite the work of CLA, that approval not to be denied by the constituent associations for reasons other than an assessment of effective delivery of service in the five defined areas. CLA will not engage in activities in competition with its federated constituents. Each subsequent year the outcomes of the business plan will be reviewed by the reconstituted Board and a renewed plan adjudicated, and ultimately approved and funded.

Library Consortia

LIBRARY CONSORTIA illustrate the power of working together. Universally agreed-upon standards and protocols, connectivity-enabled networks, and unified digital ecosystems emerge from consortia and enhance the services they offer to Canadians. We commend their collaborative enterprises and encourage them to continue the search for additional alliances.

THE PANEL RECOMMENDS THAT:

13. provincial ministries charged with post-secondary education in the Western region (British Columbia, Alberta, Saskatchewan, and Manitoba) and the Atlantic region (Newfoundland & Labrador, New Brunswick, Prince Edward Island, and Nova Scotia) gather together in their regions to discuss ways and means of coordinating or identifying a pathway for the resourcing of collaborative activity amongst COPPUL institutions and CAUL institutions and thus fostering innovation and cost savings in the respective regions.

14. all consortia focus on their services to members, and through their members to the clientele of those institutions utilizing the member's services and collections. They should be measured in their relations with governments focusing only on matters associated with their primary services; and, in other matters they are encouraged to partner with relevant national or provincial/territorial associations to coordinate advocacy activities.
15. all consortia, but particularly those with significant financial exposure by constituent members (e.g. CKRN, OCUL, COPPUL, CAUL, etc.), commit to external assessment regularly to determine whether the original value proposition that prompted their establishment is still valid.

The Canadian Archival System

WE COMMEND CCA AND ITS MEMBERS for their collaborative enterprises and encourage them to search for engagement with an even wider range of stakeholders. The social contract between the archival community and society deserves redefinition. We indicate the responsibility of provincial ministries to ensure appropriate funding of archival networks.

THE PANEL RECOMMENDS THAT:

16. CCA expand its membership to include representation of major stakeholders in the public and private sectors engaged in the preservation of and access to Canada's documentary heritage.
17. CCA sponsor the process by which provincial/territorial archives councils, AAC and AAQ redefine the archivist's relationship with individuals and communities, helping them to preserve and nurture their own documentary heritage, for their benefit and for the benefit of society as a whole.

Libraries and Archives Collaborating for Canada's Documentary Heritage

TO BE EFFECTIVE, collaboration requires agreed-upon policies and best practices. Provincial, territorial, and municipal governments are the agents for change in the standardization of policies in information management

and the updating of legislation regulating archives. The CCA can play an informed and coordinating role in developing best practices within library, archival, and heritage councils and networks. LAC needs to be active in funding collaboration, developing a collaborative Trusted Digital Repository, and coordinating existing heritage databases. The essential element is united work with like-minded people and principles to bring about greater services and visibility to Canadians.

THE PANEL RECOMMENDS THAT:

- 18.** provincial, territorial, and municipal governments enact a policy on information management that defines information management and recordkeeping roles and responsibilities, comparable to the Treasury Board Secretariat's *Policy on Information Management* ([http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?section =text&id=12742](http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?section=text&id=12742)).
- 19.** provincial, territorial, and municipal governments review and update the legislation and regulation of archives, reflecting the principles of the Universal Declaration on Archives adopted by the General Conference of UNESCO, 10 November 2011 and the digital requirements which have transformed society in general and the world of information in particular.
- 20.** provincial and territorial archive councils and provincial archives in collaboration with the Canadian Council of Archives (CCA) and LAC undertake to gather and publish current and comprehensive statistics about holdings and users.
- 21.** the *Provincial and Territorial Public Library Council* (PTPLC), the *Canadian Council of Archives* (CCA), and the *Canadian Heritage Information Network* (CHIN) in partnership collect, develop, and advertise best practices of inter-institutional and inter-professional (galleries, libraries, archives, museums, and others) collaboration within a province/territory and across all provinces/territories.
- 22.** the Federal Government establish a Libraries and Archives Collaboration Fund, to be administered jointly by LAC, CARL, CLA, and CCA to stimulate collaboration within the library and archives communities and from which innovative collaborative projects of libraries together with archives, libraries with libraries, and archives with archives, are funded.

23. LAC facilitate and receive funding for the development of a strategy for national TDR collaboration while extending such a strategy to cloud storage, in consultation with relevant stakeholders from the library and archives communities and beyond. Special attention should be given to advance the business case for institutional archives whose primary mandate is the management of their parent institution's records and archives.
24. LAC and CHIN start a joint project to explore the possibilities of building tools for coordinated searching of the existing descriptive databases.
25. library and archival institutions, associations, councils, and other bodies look for alliances, if appropriate, with other organizations in the cultural and cultural heritage sectors.

Archives and Communities

IN ORDER TO RECOGNIZE THE PRINCIPLE that keeping archives in the communities where they were created is an essential asset for the development of a sense of belonging to that community and the construction of a strong community identity, the Panel points to the responsibilities of provincial and territorial governments.

THE PANEL RECOMMENDS THAT:

26. provincial and territorial ministries responsible for libraries and archives develop programs of financial aid that will allow communities to take charge of the preservation, treatment, and availability of archives and other components of their documentary heritage, thus ensuring the necessary integration between archives and the communities where they were created.
27. provincial and territorial governments, recognizing that small communities rarely have sufficient budgets to equip themselves with permanent resources for the preservation of their documentary heritage, put in place means that allow these small communities to profit from professional expertise in archival science and especially in the domain of digital archives.

Academic Libraries

● ANALOGUE CULTURAL PATRIMONY

The nation's rare and unique books, and its numerous and diverse special collections, the latter composed of print, manuscript and media material, are held in a range of libraries: LAC, CARL, CULC, NRC-KM, and APLIC. Their availability and preservation are of paramount concern. Incomplete media reports of library closures and the suspected jeopardizing of irreplaceable collections require prompt and informed intervention. To ensure the professional stewardship of this vital cultural patrimony, the Panel identifies the responsibilities of LAC, U15 Research University Provosts, and the Auditor General.

THE PANEL RECOMMENDS THAT:

28. the Librarian and Archivist of Canada create a pan-Canadian committee of peers, consisting of appropriate stakeholder leadership from the library community, such as, but not limited to, CARL, CULC, NRC-KM, and APLIC, to discuss the standards and protocols that would underpin a network of regional preservation/storage facilities for both print and digital materials.
29. libraries work collaboratively in developing shared print collections. To pursue this end, it is recommended that Provosts of the U15 Canadian Research Universities establish and seek sustainable resourcing for three to five regional preservation/ storage facilities as last copy repositories, open to all repositories, to ensure the preservation of the entirety of the Canadian analogue heritage patrimony.
30. the Auditor-General of Canada (AGC), who has oversight accountability for the well-being of the Canadian patrimony as a legacy to future generations of Canadians, review the decisions made with regard to the actions taken relating to federal departmental libraries, and conduct a cost/benefit analysis of the decisions, the process undertaken to operationalize the decisions, the expected efficacy of the outcomes, and assess whether there was understanding that the national patrimony required consideration in the decision and the implementation process.



Academic Libraries

● STRATEGIES FOR BUILDING DIGITAL SPACES

The management of collections and the possibilities of making the digital world visible in the built spaces of libraries concern both academic and public librarians. Although innovative work has been done and is underway, we encourage the continuation of collaborative networks and infrastructure.

THE PANEL RECOMMENDS THAT:

31. libraries and archives work collaboratively on establishing shared digital infrastructure for acquiring, disseminating, and preserving digital content.

Public Libraries

THE CENTRALITY OF THE PUBLIC LIBRARY to civic life in Canada is indisputable. However, inequities in available services between urban and rural public libraries must be addressed. Print and technologically-driven services need to be both mandatory and consistent. To resolve issues of inconsistent service, rural bandwidth, and InterLibrary loan, we identify lead roles in public library boards, provincial and territorial library associations and ministries, and Industry Canada. We also insist on the benefits of consortia to ensure and maintain services. To provide Canadians with access to the content they need, CULC and CARL, in conjunction with BiblioPresto and international library associations, should work closely with publishers and vendors to ensure unified and rich collections.

THE PANEL RECOMMENDS THAT:

- 32.** public libraries make their work visible by posting evidence-based studies and economic impact studies on library websites for the benefit of the entire library community.
- 33.** public libraries continue to share statistical data freely with CULC and other similar organizations.
- 34.** library associations and organizations undertake and publish research into common issues facing the public library community.
- 35.** faculties of library and information studies introduce a course on community development to better prepare graduates to fulfill changing roles in public libraries and meet the needs of a diverse community.
- 36.** public libraries regularly inventory their programs, services, policies, and physical spaces to detect and remove barriers.
- 37.** that public libraries engage in meaningful community consultations to ensure the relevance and inclusiveness of their institutions.
- 38.** that public libraries pursue and strengthen their collaborations with literacy councils to expand and improve their English Language Learning programs and services.
- 39.** provincial and territorial governments recognize, through legislation, the need for urban and rural libraries to provide digital services.

40. the federal government, namely Industry Canada, adopt the need for better rural bandwidth as a higher national priority. We make this recommendation fully recognizing that the federal government has increased its spending on rural broadband initiatives but aware, as well, that these initiatives are not part of a formal, national strategy. There is no commitment to meet specific standards in rural areas. Realistic timelines for the delivery of acceptable bandwidth into all Canadian communities are needed.
41. LAC re-establish its role as mediator working on behalf of print-disabled Canadians, and in the first instance bring all competing service providers together, including non-aligned representation from the print-disabled community itself, for the purpose of seeking a single, sustainable, and effective service model that is welcomed by the print-disabled as the best in service of their interests. It is recommended that in the absence of a mediated settlement, LAC will seek to craft a governmental/political solution to achieve a similar purpose.
42. provincial and territorial governments work with the federal government to ensure that Aboriginal Canadians receive fair and equitable access to public library services.
43. where necessary, ministries of provincial and territorial governments with a responsibility for the delivery of public library services support Canadian public library systems in forming larger units of service in order to provide adequate technologically-driven services, to mandate the provision of these services, and to promote the purchase of ebook material through consortia.
44. each province and territory review its InterLibrary loan policies in order to ensure that these policies mesh across sectors and place an emphasis on the research needs of Canadians and not on everyday library reading needs. Other mechanisms, such as ebook cooperatives, should be developed to meet everyday needs of customers. Responsibility lies with the various provincial and territorial library associations plus CLA, working in alliance with LAC as a partner. Provincial and territorial government ministries should be involved, since changes may involve regulations and policies. Since college, university, school and public libraries often

report to multiple ministries, it is impractical for government to act as the lead.

45. libraries and publishers work more closely together with an understanding that they are part of the same ecosystem and need each other to be successful and to provide Canadians with access to the content they need. Since public libraries deal more with trade publishers, responsibility for public libraries lies with the *Canadian Urban Libraries Council*. CULC libraries produce almost 90% of all Canadian public library circulation and CULC is designed to act quickly and to help libraries as organizations. Since academic libraries deal more with academic publishing, responsibility lies with the *Canadian Association of Research Libraries*. For products used by all sectors, such as electronic databases, both CULC and CARL should work together.
46. CULC and CARL, in conjunction with BiblioPresto and international library associations, support libraries and vendors to work in closer collaboration, allowing libraries to obtain content that can be merged into unified collections emphasizing the nature of the content itself and not the name of the vendor who provides that content.

Federal Libraries

AS NOTED IN A 2010 CONSULTANT REPORT, *The State of Health of Federal Libraries:* “a new information delivery model is needed to satisfy the demands of the new knowledge worker, who can be described as tech savvy, mobile, unencumbered by physical office, and working collaboratively with team members locally and around the world.” And further, “Libraries need community, sharing of best practices, and the benefits of economies of scale.” While the report noted that libraries were evolving and responding to the demands of their users and stakeholders, they were evolving independently of one another. New models are needed to share services such as digitization, offsite storage, procurement and common technology issues. This federal library evolution, to be successful, needs proactive champions to advance.

In the domain of special and federal libraries, electronic services are key. The initiative of the integrated Federal Science Library provides eight departments with access to print and electronic collections. This pilot program could be scaled to a whole of government approach, with significant cost-saving benefits being reinvested in other resources. Basic

training in advanced skill sets will be necessary to ensure the success of this expansion. The main players are NRC-KM, Agriculture and Agrifood Canada, LAC, and TBS.

THE PANEL RECOMMENDS THAT:

- 47.** the Federal Science Library (FSL) be used as a pilot to demonstrate the concept of an integrated library model. This initiative is well advanced and represents a demonstration of a cost-effective and scalable service delivery model. The goal of the 8 departments and agencies involved is to provide increased visibility and access by Canadians to GoC print and electronic library collections. Responsibility lies with the National Research Council Knowledge Management (NRC-KM) and Agriculture and Agrifood Canada (AAFC), supported by LAC and TBS.
- 48.** LAC use the pilot findings to determine a realistic and informed strategy for scaling to a whole of government approach that provides a platform for search and discovery, management of library resources, document sharing, and consortial acquisitions. Resources saved over time can be re-invested in licensing more electronic information, digitization of print-only materials, and ensuring librarians' expertise is available for training, in-depth reference, and supporting open publication and open data requirements within their agencies.
- 49.** LAC, with financial investment from finance and the individual departments, invest in the enterprise-level basics necessary to ensure success of the proposed model changes. Many department libraries and IM groups lack the resources and capacity to manage change while coping with significant continuing re-organization. This initial investment will result in lower costs and better service over time.
- 50.** LAC promote the value of federal libraries, to reflect that they are integral to government knowledge workers and informed decision-making. It is also recommended to promote the value of library professionals to the fields of archives, libraries, and records and data management.
- 51.** individual departments and agencies invest in the information resources and library expertise necessary and appropriate to serve their clientele, and support their continued professional development.

See related recommendations in the Analogue Cultural Patrimony section above.

School Libraries and Learning Commons

SCHOOL LIBRARIES AND LEARNING COMMONS are immensely valuable assets to academic success at all levels of instruction and learning. Because the benefits of these resources have not been fully or widely realized, the Panel is convinced that a renewed emphasis on their importance is needed. We call for coordinated attention from Ministers of Education in Canada-wide and provincial settings and from Faculties of Education and library and information studies programs. The anticipated advantages in literacy acquisition, curricular innovation, and superior scores and placement for students make a compelling case.

THE PANEL RECOMMENDS THAT:

52. the *Council of Ministers of Education Canada* (CMEC) commission a pan-Canadian assessment engaging the full range of stakeholders, to bring forward a clear and prescriptive set of directives to frame a national policy consensus on the most appropriate model for school libraries/learning commons to maximize their contribution to the K-12 experience and its learning outcomes.
53. Ministries of Education work with Boards of Education and their respective schools to provide the sustainable funding necessary to realize the development of school libraries/learning commons.
54. Faculties of Education in universities with teacher-librarian programs or library and information studies (LIS) programs be funded to increase the number of graduates who would have the proper competencies to manage the new school library/learning commons.
55. provincial and territorial ministers responsible for public libraries and ministers of education join together to develop provincial standards that would direct the development of a school-house public library model drawing inspiration from the best practices and successes of those currently in operation.

Cultural Spaces and Voice

ALONG WITH STRUGGLES for the repatriation of Indigenous materials to their originating communities and the provision of equitable library and archive services to reserves across the country is the very real quest for an authentic Indigenous voice. To address the need to record and retain the stories within Aboriginal communities, our recommendations take two directions: an institutional program with archivists joining forces with the First Nations University and local community initiatives. The Aboriginal population is the fastest growing demographic in Canada; their family archives need to be created. We propose to meet this need through a voluntary mentoring program, a collaboration with the charitable program Indspire, which raises funds to deliver programs providing tools for Indigenous peoples. Responsibility lies with LAC, the Canadian archival associations (ACA, AAQ, CCA), the First Nations University, and Indspire.

THE PANEL RECOMMENDS THAT:

- 56.** the librarians and archivists in the First Nations and Aboriginal Heritage divisions of LAC in collaboration with ACA, CAA, and AAQ engage in plans with the First Nations University of Canada to draft an introductory program of Indigenous Archival Studies to be offered in communities and reserves across Canada.
- 57.** LAC in collaboration with ACA, CCA, and AAQ and the charitable program Indspire establish a volunteer mentoring program involving archivists and Aboriginal youth to promote the creation of family archives.

See related recommendations in the Archives and Community section above.

Education of Librarians and Archivists and Professional Development

THE CURRENT AND CONTINUING EDUCATION of library and archive professionals requires that their formation and practice reflect the realities of our world and its transformed workplaces. This education must reach out to new publics and engage with new media. The lead agents here are Provosts and Deans of Library and Archive Programs who need to ensure the pertinence of their curricula and

the continued preparedness of mid-career professionals. We also point to the responsibility of employers to invest in continuing professional development.

THE PANEL RECOMMENDS THAT:

- 58.** provosts and deans of Library and Archive programs embark upon a system-wide review of their programs in partnership with professionals in practice, and particularly employers, to refine mandates, reduce unnecessary program overlaps, exploit technology to achieve efficiencies and, assess the efficacy of program outcomes by way of a thorough review of course syllabi.
- 59.** deans and directors of graduate library schools, ischools, and archival programs, working with the appropriate provincial associations conceive and implement systematic library and archival pan-Canadian mid-career certification programs to ensure that all Canadians are served by the most knowledgeable and current library and archival practitioners.
- 60.** provincial/territorial library and archival associations/councils develop their professional development curricula by way of engagement with their respective audiences – both practitioners and employers.
- 61.** while practitioners must recognize their responsibility for their own development, employers must invest significantly more financial resources in the development of their staff.
- 62.** library and archival institutions and professional communities identify their emerging leaders and make sure they have access to leadership development programs.

See related recommendations in the Analogue Cultural Patrimony section above.

Copyright and Canadian Libraries and Archives in the Digital Environment

AWARENESS OF AND COMPLIANCE with copyright legislation is a vital issue for librarians and archivists. The law provides for considerable fair dealing and flexibility, which should be utilized. However, inequitable access to electronic resources requires more institutional cooperation on licensing and hosting. As purchasers or licensees of copyrighted works, libraries provide considerable support for authors and their publishers. Consequently, in all discussions of copyright, the interests of

library and archive patrons must be balanced against the rights of creators of literary and artistic works to be appropriately recognized and compensated.

THE PANEL RECOMMENDS THAT:

- 63.** libraries and archives make full use of their users' rights of fair dealing and the additional specific exceptions and limitations to copyright to engage in productive initiatives such as digitization of collections in analogue media, providing private study copies to patrons, and otherwise using the flexibility provided by the law as appropriate.
- 64.** libraries and archives continue to participate in proceedings before the Copyright Board to ensure that their positions are well represented.
- 65.** library licensing practices for electronic resources be revised. From a user's perspective, the Internet enables equal access to digital information wherever there is a connection. But, access to licensed electronic resources, including ebooks, varies greatly across Canada because licensing is still done at the local, or sometimes at the consortial, level. Greater institutional cooperation on licensing and hosting should be given high priority to equalize access to the resources by using cloud services or other shared Internet infrastructure.
- 66.** in discussions of how to adapt to the digital environment, concerns about increasing access are balanced with concerns about ensuring that creators of literary and artistic works are adequately compensated for their contribution to Canada's cultural legacy.

Libraries, Open Access, and Open Educational Resources

LIBRARIANS CAN ADVANCE THE WORK of scholarship by educating faculty about the management of copyright, by undertaking library publishing, and by facilitating the development of open educational resources.

THE PANEL RECOMMENDS THAT:

- 67.** librarians continue to educate faculty about managing their copyrights in scholarly articles and monographs to maximize the impact of their work by broadening access to it.

68. leaders of university administrations, libraries, and presses intensify efforts to rationalize the allocation of resources and realign incentives to ensure that scholarly publishing on campus is being done as efficiently and effectively as possible. Moreover, these leaders should explore more robust institutional cooperation to share the resources necessary to support vibrant and sustainable scholarly publishing. Particular regard should be given to supporting publishing in the social sciences and humanities, which do not receive as much government and private research support as the natural sciences for research and publication.
69. librarians with an interest in education, formal and informal, explore opportunities to participate in the growth of open educational resources by producing, or supporting faculty who produce, open course materials and open textbooks and by helping time-pressed educators or self-learners find high quality, relevant OER by building collections or discovery tools.

Royal Society of Canada Oversight

MANY OF OUR RECOMMENDATIONS exhort and direct institutions and organizations to act. These actions are critical to the preservation and enhancement of libraries and archives in Canada and to the commitment to cultural literacy in the digital age. The Panel is convinced that the slow and, in some cases, precipitate declines must be reversed. Acutely aware of the continuous nature of this project and its importance to every citizen of Canada, the Panel wants assurance that its work is effecting change. Through their support of our work, RSC underscores the value proposition and ensures that the Society is an engaged monitor of developments.

THE PANEL RECOMMENDS THAT:

70. within 24 months, the Royal Society of Canada secure resources to re-commission the Panel to investigate and report on the changes in disciplinary and government organizations and institutions.

Appendix A

Mapping and Timeline Application: A Visualization of Canada's Libraries and Archives

<http://cwrc.ca/rsc-src/>

This mapping and timeline application displays the location of, and the year of establishment for, many of the libraries and archives of Canada. Both libraries and archives are represented, and for institutions that function as both a library and an archives, they are indicated as “Combined” institutions (“mixed” indicates a particular community has more than one type of institution). All 4,798 represented institutions appear on the map, and roughly two-thirds of the institutions (3,077 of 4,798, or 64%) appear on the timeline. Possible data elements that might be included for a particular library or archives include the following: name, community, province/territory, institution, type, population served, establishment year, and URL. Note: multi-branch library systems are represented as one library (i.e., branch libraries are not represented), unless a particular branch library is located in a different community, in which case it is represented.

In the default Map View, both the timeline and map can be resized via the down arrow appearing in the center below each panel, and the map can be panned and zoomed to focus on different geographic regions. In addition to the Map View, there are also List View and Grid View options, which display the search result records in particular formatted styles (these view options are available between the timeline and map panels). Finally, the search results can be exported in a variety of formats by clicking on the orange and white scissor icon which is located in the upper right corner above both the timeline panel and the map panel (the icon will appear after you hover your mouse over either the timeline panel or the map panel).

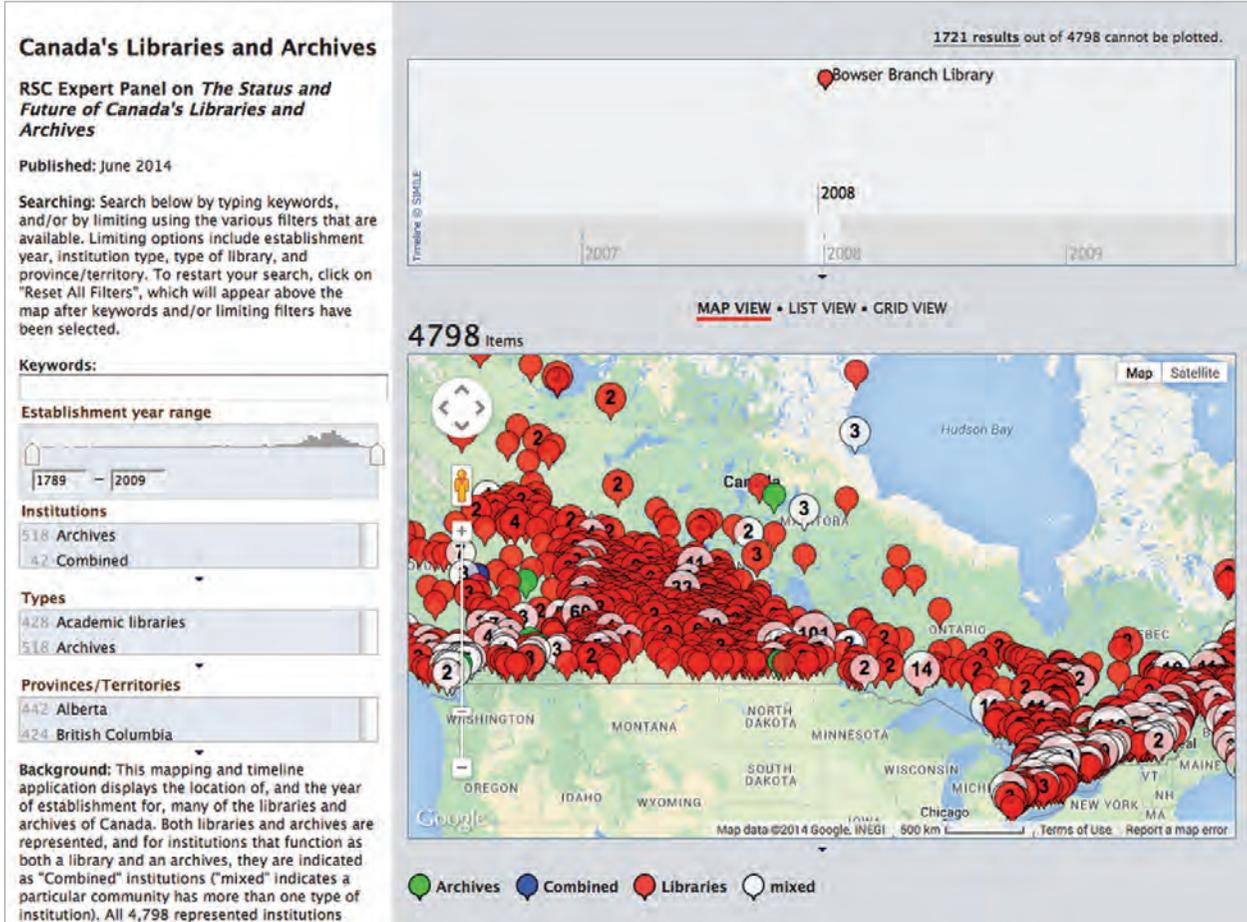


Image caption

Appendix B

The Panel has consulted many resources, including the ones listed in this appendix. Available statistical information validates the Panel's recommendations. Public and private archives in Canada are far behind the library community in gathering and publishing reliable statistics.

National Statistics

MW Group: State of Health of Federal Libraries, 2010

National Statistical Profile of All Canadian Libraries, 2009-2010

<http://www.cla.ca/AM/Template.cfm?Section=Advocacy&Template=/CM/ContentDisplay.cfm&ContentID=13785>

Public Service Human Resources Management Agency of Canada: Library Science Community Profile, 2007

http://www.gcpeia.gc.ca/wiki/ADM_Task_Force_on_the_Future_of_Federal_Library_Service

Public Service Human Resources Management Agency of Canada: Profile of the Library-Related Workforce, 2007

http://www.gcpeia.gc.ca/wiki/ADM_Task_Force_on_the_Future_of_Federal_Library_Service

Statistics Canada: Government Expenditures on Culture, 2009/2010

<http://www.statcan.gc.ca/cgi-bin/af-fdr.cgi?teng=dq120404e-eng.pdf&tfra=dq120404e-fra.pdf&l=eng&loc=dq120404e-eng.pdf>

Canadian Council of Archives

http://www.cdncouncilarchives.ca/CCAFactSheet_v1.2Updated_EN.pdf

By Province

Alberta Public Library Statistics

http://www.municipalaffairs.gov.ab.ca/mc_public_library_statistics.cfm

British Columbia Public Library Statistics

<https://www.bced.gov.bc.ca/pls/reports.htm>

Canadian Association of Research Libraries Statistics

<http://www.carl-abrc.ca/statistics.html>

Manitoba Public Library Statistics

https://mb.countingopinions.com/index.php?page_id=4

New Brunswick Public Library Statistics

<http://www.gnb.ca/0003/publications-e.asp>

Ontario Public Library Statistics

<http://www.mtc.gov.on.ca/en/libraries/statistics.shtml>

Quebec Public Library Statistics

http://www.banq.qc.ca/services/services_professionnels/milieux_doc/statistiques/stats.html

Saskatchewan Public Library Statistics

<http://www.lib.sk.ca/Statistical-Summary>

Provincial and Territorial Annual Reports.

A 2013 listing of all public library branches from:

<http://stephenslighthouse.com/2013/02/19/canadian-public-library-statistics-by-province-or-territory-and-nationally-and-links-to-sources/>

The Canadian Urban Public Library Council (CULC) Annual Statistics

<http://www.culc.ca/>

Other Reports

Dooley, Jackie M., and Katherine Luce. 2010. Taking our pulse: The OCLC Research survey of special collections and archives. Dublin, Ohio: OCLC Research.

<http://www.oclc.org/research/publications/library/2010/2010-11.pdf>

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