

Planning and Governance Survey of BC Public Libraries: Results

A report of the British Columbia Library Trustees Association
May 2013

BCLTA Board

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Introduction

Over the past decade, there has been an avalanche of change in our society, driven in large part by huge advances in technology.

During the same period, we also have witnessed a decrease in the growth of public spending at all three levels of government and an increase in the healthcare budgets, resulting in fewer dollars for many community endeavours, including public libraries in British Columbia.

These forces have put significant additional pressure on public libraries to meet the changing needs of their constituents who are their primary funders through the municipal tax base.

These forces have also put pressure on boards of trustees to better substantiate their need for funding.

It is becoming increasingly clear that public library boards in BC need to have a better handle on their goals and objectives both short and long term. These goals must be clear, concise and measurable. They should also excite and motivate staff, volunteers and the community to work together to “build a better library”.

One of the roles of the BCLTA, as identified in our Strategic Plan, is to “Provide Support for Library Trustees.” See http://www.bclta.ca/pdfs/Strategic_Plan_2010-2013.pdf.

As part of this Goal, we conducted a survey of what types of plans BC public library boards have developed or are developing and what impediments are in the way of developing better planning and plans.

Early in 2013, we asked all 71 BC public library boards to complete a short on-line survey and are heartened by the over 80% response rate. The results of this survey are detailed in the proceeding report. It is important to note that our work in 2013 builds on prior surveys we conducted in 2011 and in 2009. Please see *Appendix A* for an executive summary of this research.

Thank you to Library Trustees of this province for your continued engagement. Collectively, we contribute a total of approximately 35,280 volunteer hours per year to public library systems across British Columbia. Together, we’re making a difference.

Paul Tutsch, President, BCLTA
Trustee, Whistler Public Library

Acknowledgements

We wish to thank the Libraries and Literacy Branch of the BC Ministry of Education for their financial support for this survey. We appreciate the contributions of Daphne Wood (Vancouver) for administering the survey and Sarah Felkar (West Vancouver) for writing and analysis, in conjunction with BCLTA Board Members. Special thanks are extended to BC public library trustees for strengthening our communities through their dedicated and ongoing efforts.

Executive Summary

- About half of the trustees have gone through the TOP training program. Considering the positive feedback on this program, we have to wonder why the program is not mandatory for all trustees. We note the question of applicability for regional library trustees (who are all elected officials).
- Strategic and Financial Plans are the most common but not embraced by all. Some libraries don't see the need for any planning at this time.
- A lack of professional help and good examples of plans appear to be significant impediments to more libraries doing more planning
- As in past surveys, respondents are very optimistic about getting infrastructure money from the provincial and federal governments.
- At least 30% of libraries and their boards do not provide fundamental orientation for their new board members. These simple steps would make new trustees more effective much sooner.
- Less than half of the boards conduct an organized self-evaluation, even though most do conduct an annual evaluation of their one employee. Organized, annual Board evaluations are an excellent way to make the board and thus the library more effective.
- By far, the most significant challenge for the next few years, according to our respondents, is funding.
- This survey provides an excellent starting point, from which to improve board effectiveness that will contribute to greater library effectiveness and vibrancy.

2013 BC Library Board Trustee Governance Survey: Overview of Results

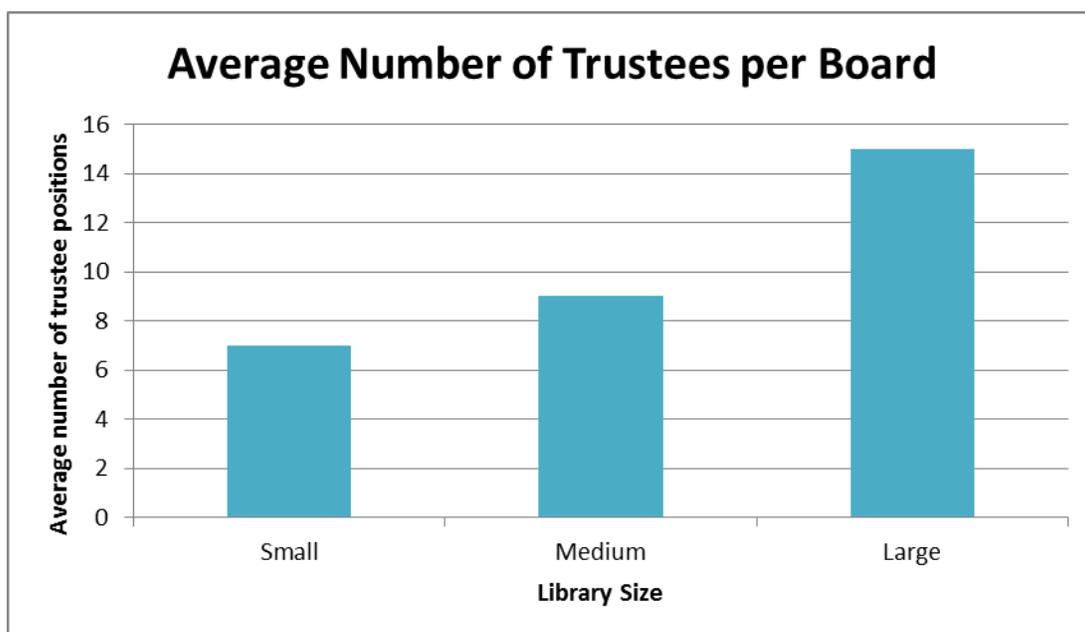
There were 59 responses to the survey, an 83% response rate. This breaks down to 77% (30) small libraries, 82% (14) medium libraries, and 93% (14) large libraries.

For the purposes of this survey report, small libraries are defined as libraries serving a population of 10,000 people or less, medium libraries as serving between 10,001 and 50,000 people, and large libraries as serving populations of 50,001 or more.

There are approximately 700 library trustees in BC. They are part of 71 library boards, and collectively give a total of approximately 35,280 volunteer hours per year or an average of 41 hours per month, per board.

Number of Trustee Positions on the Library Board

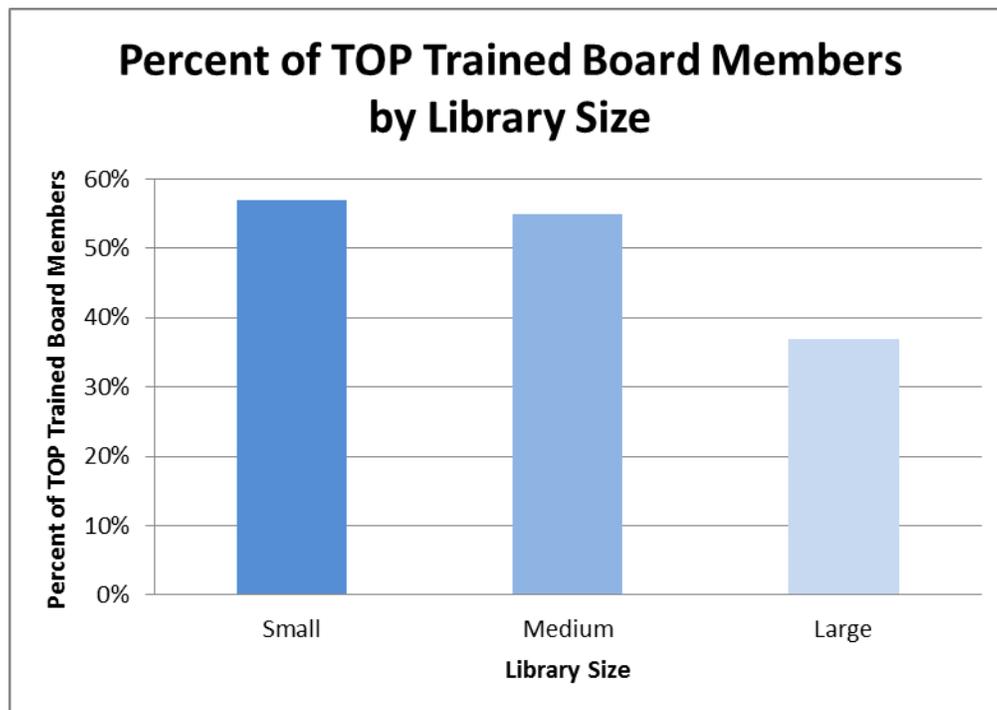
A range of library board sizes were reported, with some libraries reporting library trustee position vacancies. The average number of trustees for small libraries is 7, medium libraries 9, and large libraries have a reported average of 16 board members. This latter figure is likely inflated by the board size of regional libraries and the library federations.



Trustees with TOP Training

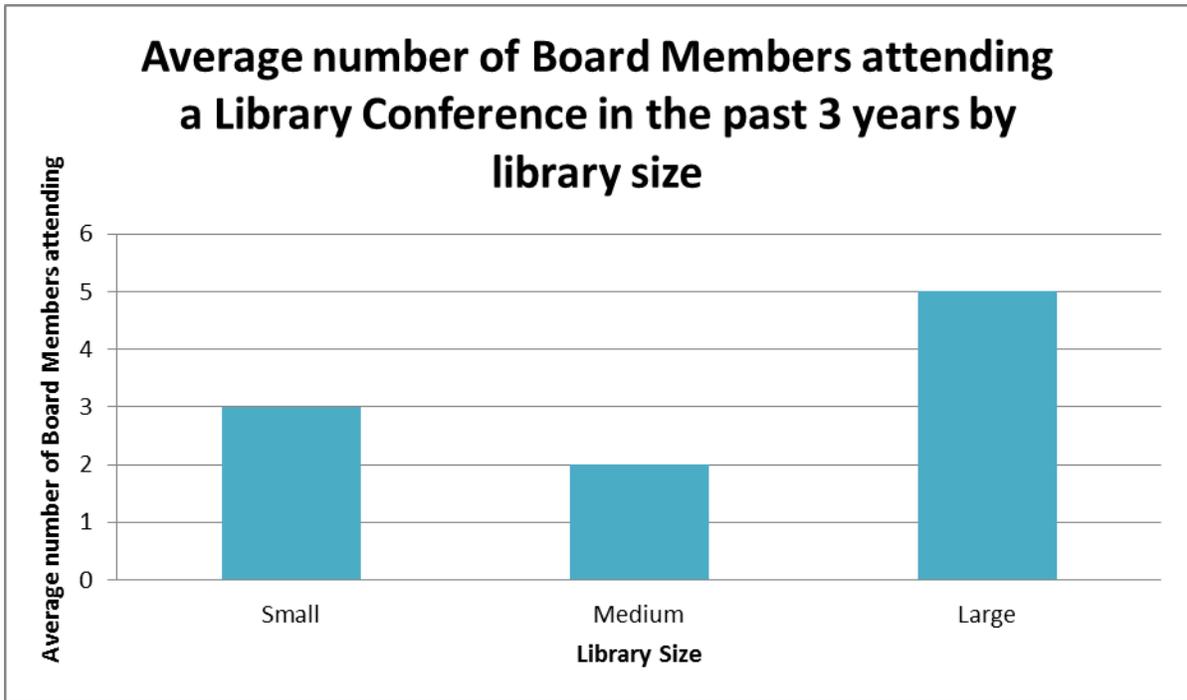
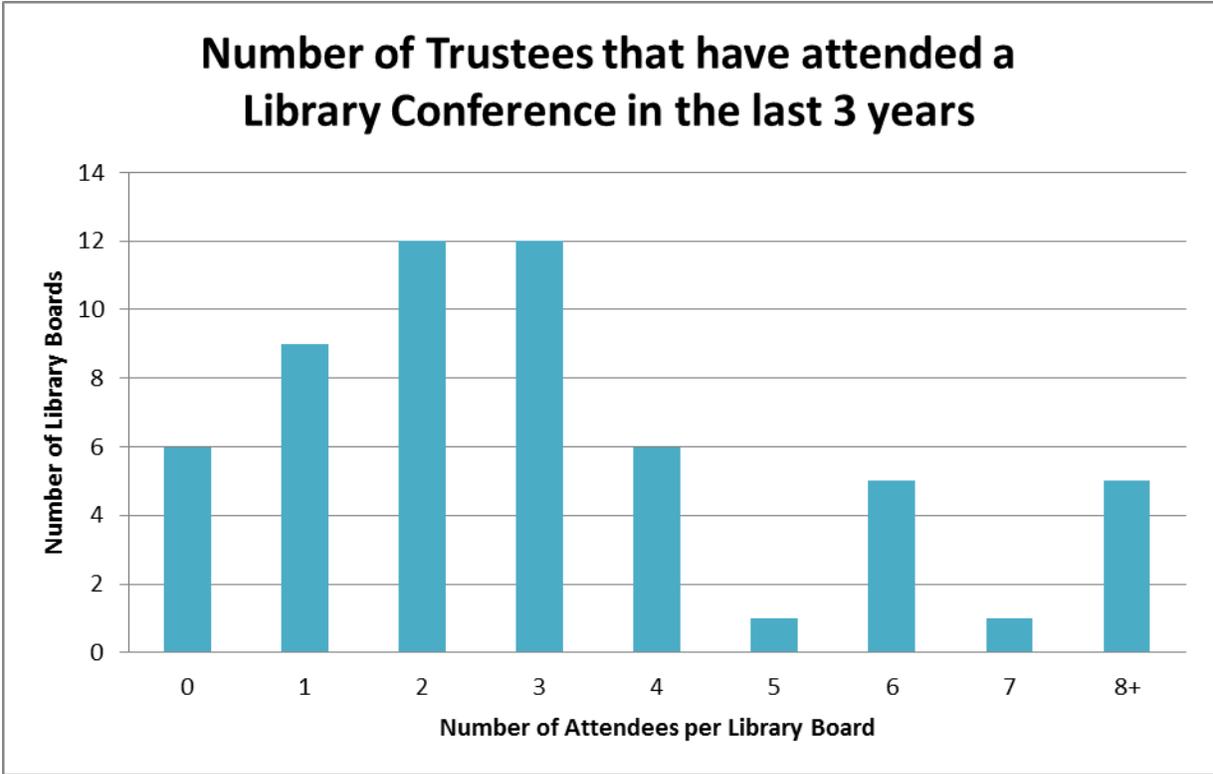
Of the reporting libraries, the average number of trustees who have completed the TOP (Trustee Orientation Program) training were 4 for small libraries, 5 for medium libraries, and 6 for large libraries. This means that, on average, 57% of trustees in small libraries, 55% in medium size libraries and 37% in large libraries have completed TOP training.

The large size category includes the regional libraries which seem to have a bigger turnover of trustees, based on their structure, and who may also perceive the training to be less relevant as they are all elected officials.



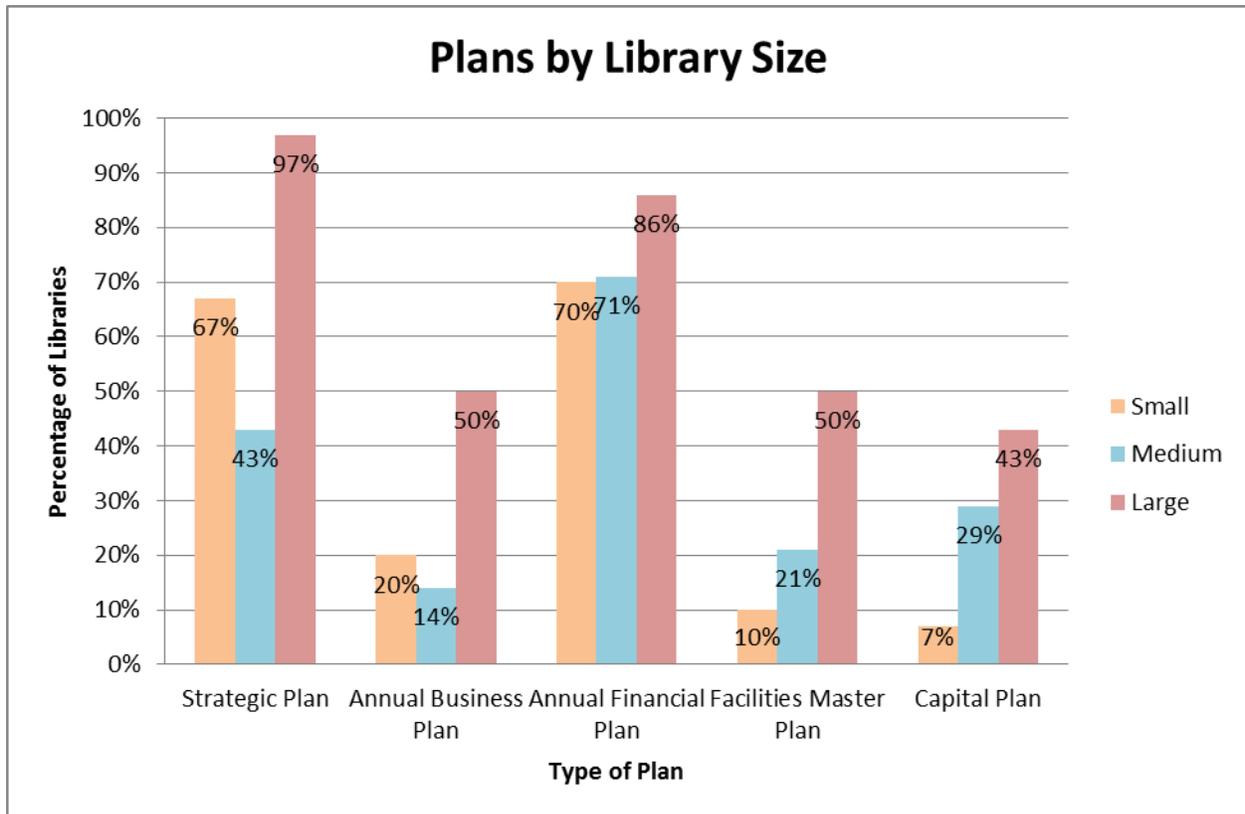
Trustees that have attended a library conference in the last 3 years

Most library boards have had between one to four library trustees attend a library conference in the past three years. When looking at the average number of trustees by library size, there were an average of three attending from small libraries, two from medium libraries and five from large libraries.



Current Plans by Type and Library Size

As expected, larger libraries have more developed planning processes. It is interesting that small libraries seem to have more current strategic plans than medium size libraries.

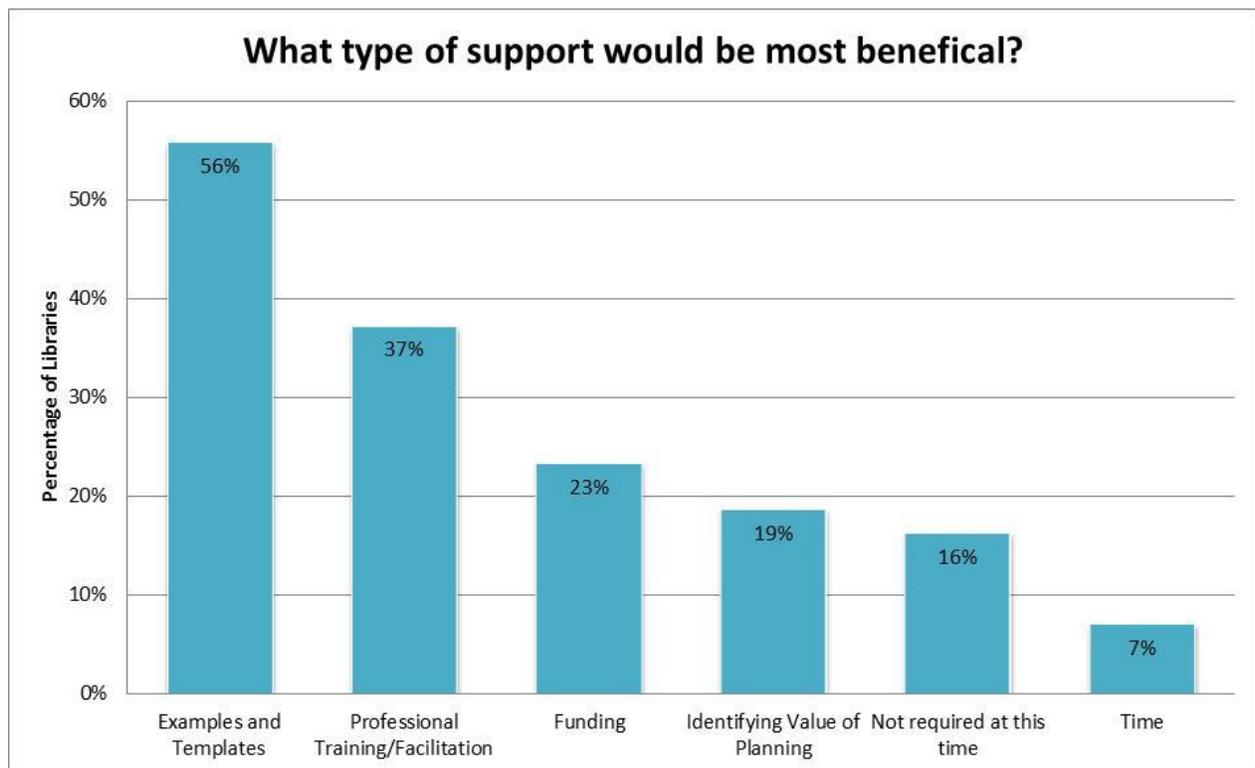


Eleven percent of responding boards have a written advocacy plan in place. Twelve percent of boards have a succession plan. There is little difference by library size.

Support Needed for Developing Plans

Libraries were asked what type of support would be most beneficial to help develop these plans in the future. There were 45 responses providing 71 suggestions to this open-ended question, falling into six categories. The type of support most needed as indicated by the responses was examples and/or templates of plans (56%), followed by professional training or facilitation (37%).

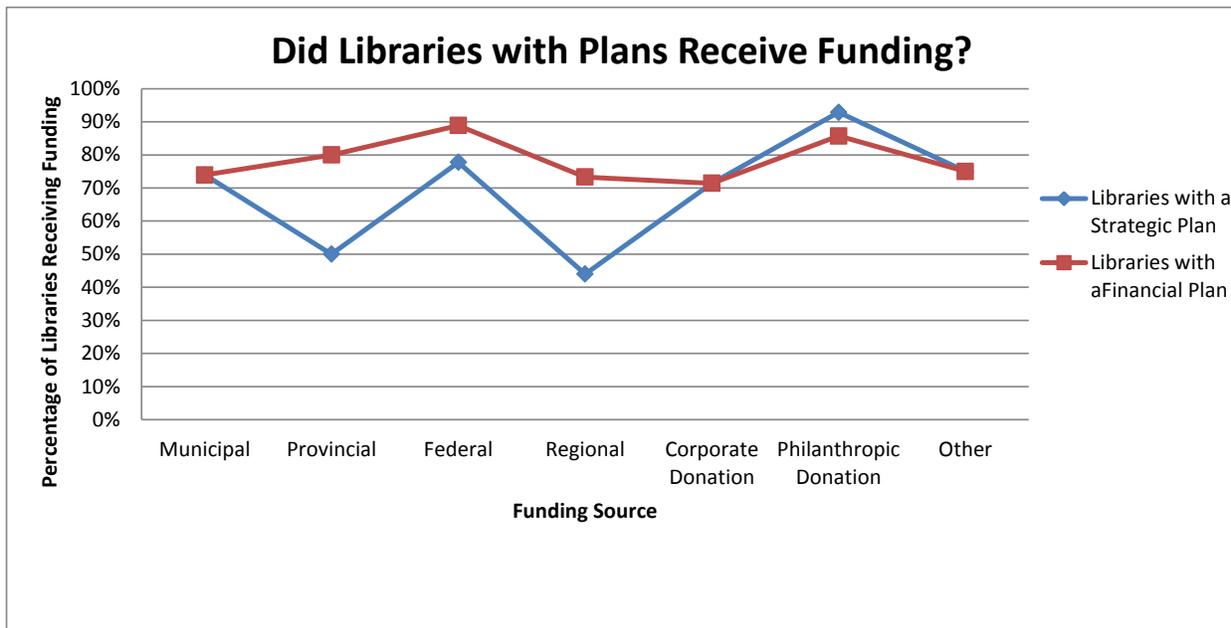
Interestingly, about 1 in 5 libraries wanted information/evidence that would substantiate the value of planning.



Impact of Strategic & Financial Plans

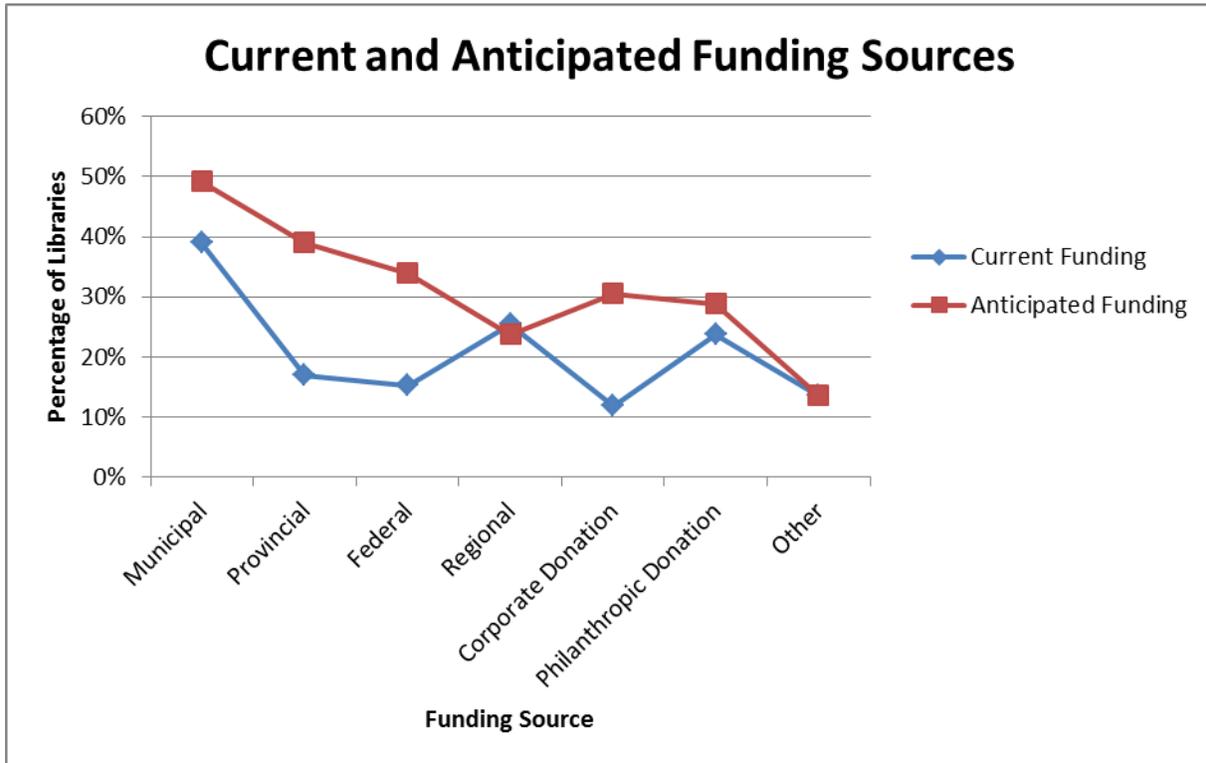
A total of 66% (39) of responding libraries had strategic plans. Of the libraries with strategic plans, 90% had received project funding for infrastructure in the past three years. 73% (43) of responding libraries had financial plans. Of the libraries with financial plans, 100% received project funding for Infrastructure in the past three years.

Libraries that did receive funding, received funding from an average of 2.3 funding sources. No library received funding from more than 5 funding sources.



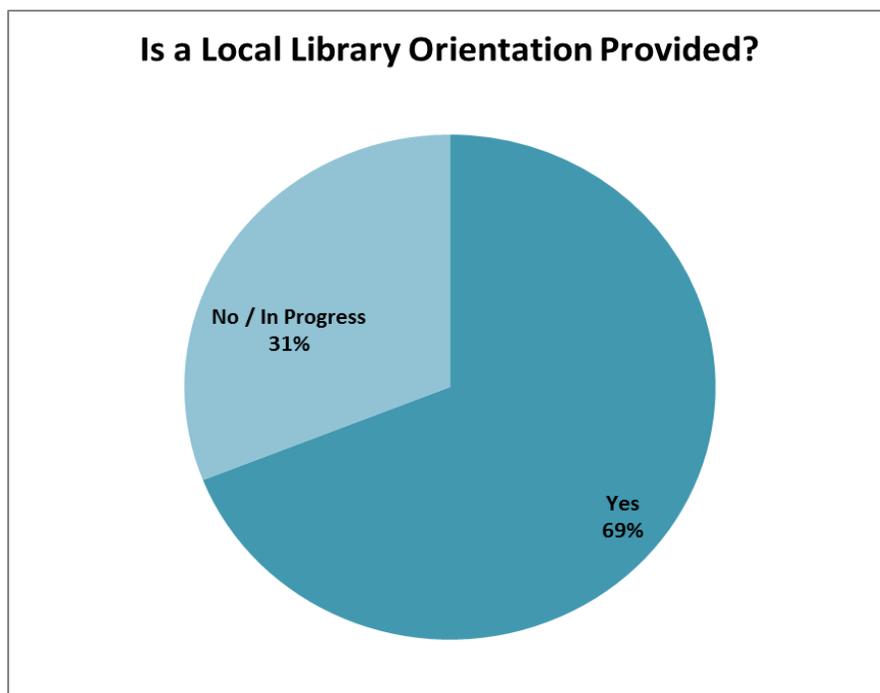
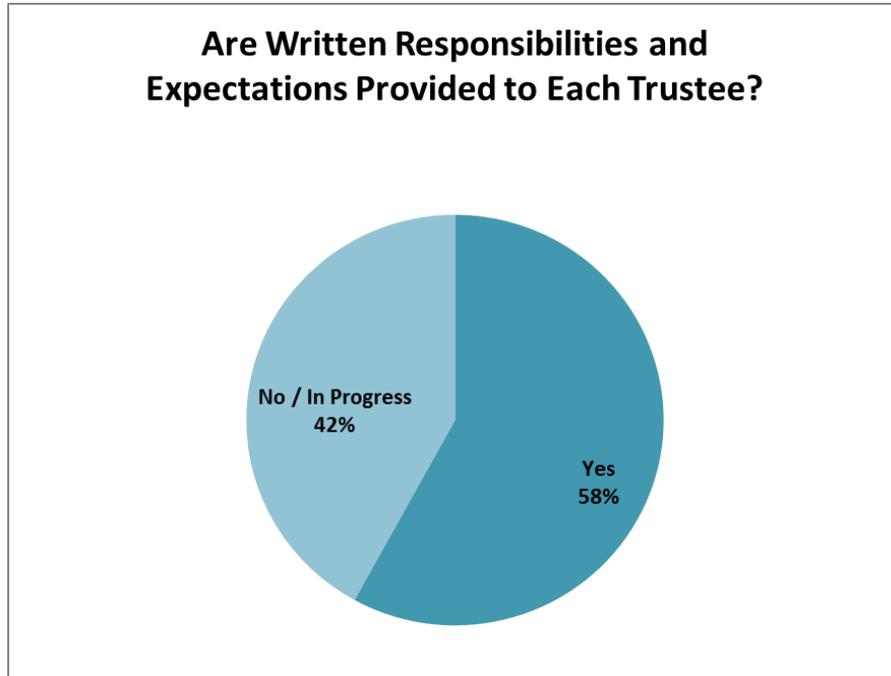
Current and Anticipated Infrastructure Funding Sources

Respondents were asked what were their sources for project funding for infrastructure upgrades in the last three years, and what sources of funding were anticipated over the next three years. For most categories, most libraries anticipated applying for more funding than is currently being received. This is consistent with our findings in the 2011 Infrastructure Study.



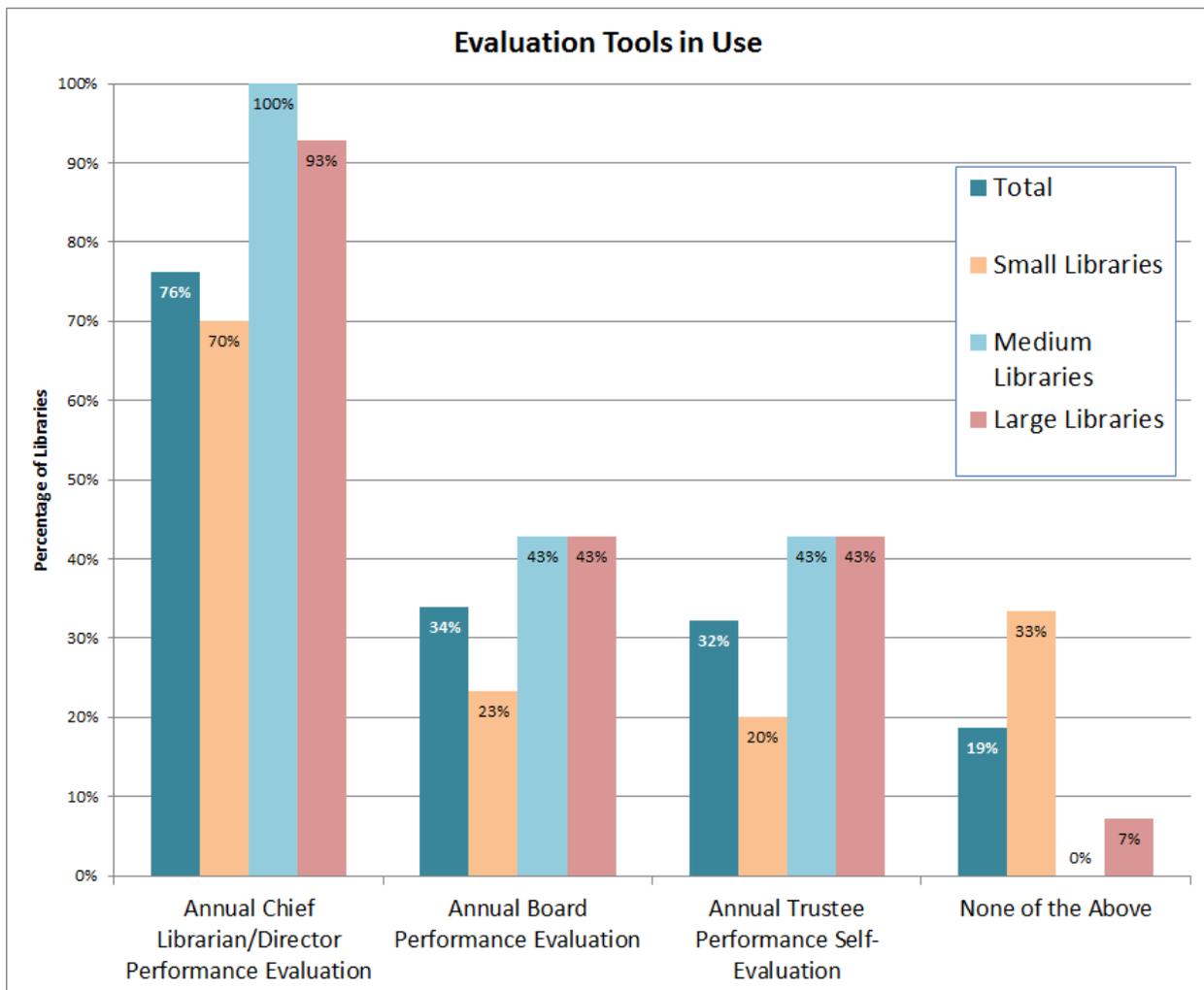
Tools for New Trustees

Written responsibilities and expectations are provided to new trustees at 58% of libraries. An orientation of the local library is provided at 69% of libraries.



Use of Evaluation Tools

81% (58) of reporting libraries are using an evaluation tool. 76% of libraries reported utilizing an annual evaluation of the Chief Librarian/Director, 34% of libraries are utilizing an annual Board performance review, and 32% of libraries are utilizing an annual Trustee performance self-evaluation. In contrast, 19% or 11 library boards report that they did not use any of the tools listed. While three-quarters of responding libraries conduct an annual evaluation of their Chief Librarian, only a third of these libraries conduct any self-evaluation of their individual or collective performance.



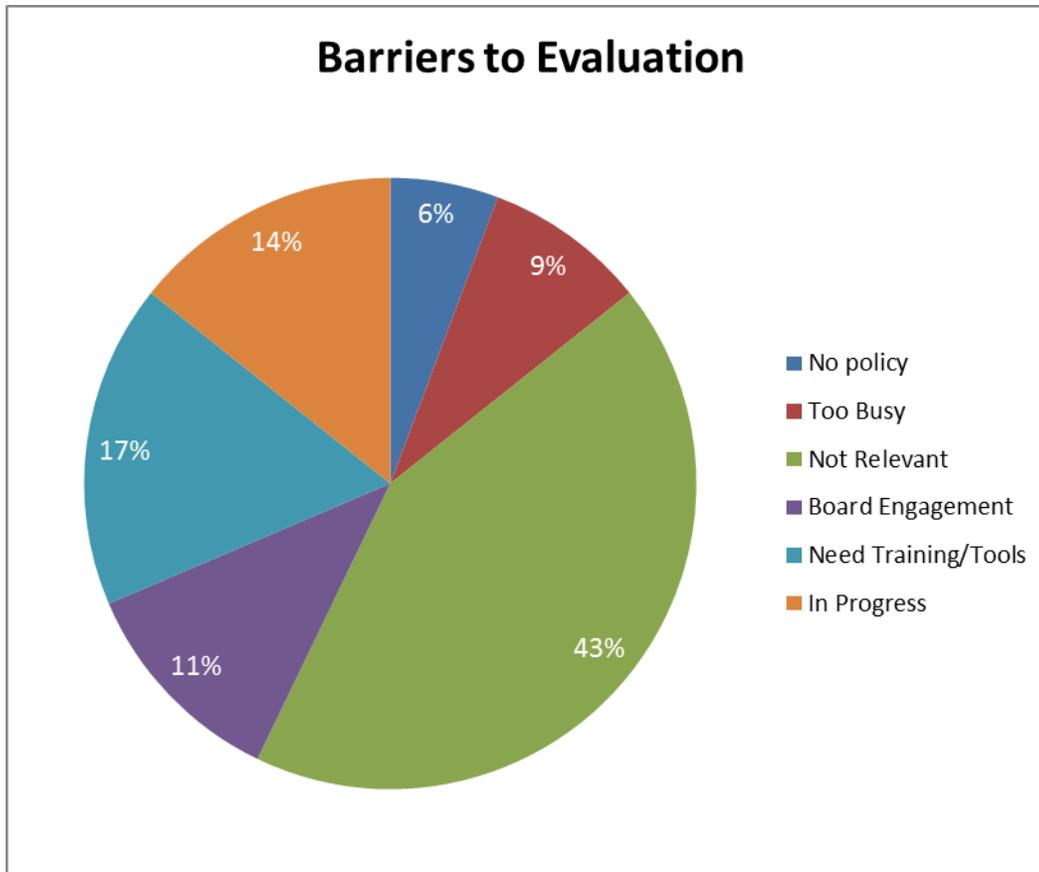
Barriers to Using Evaluation Tools

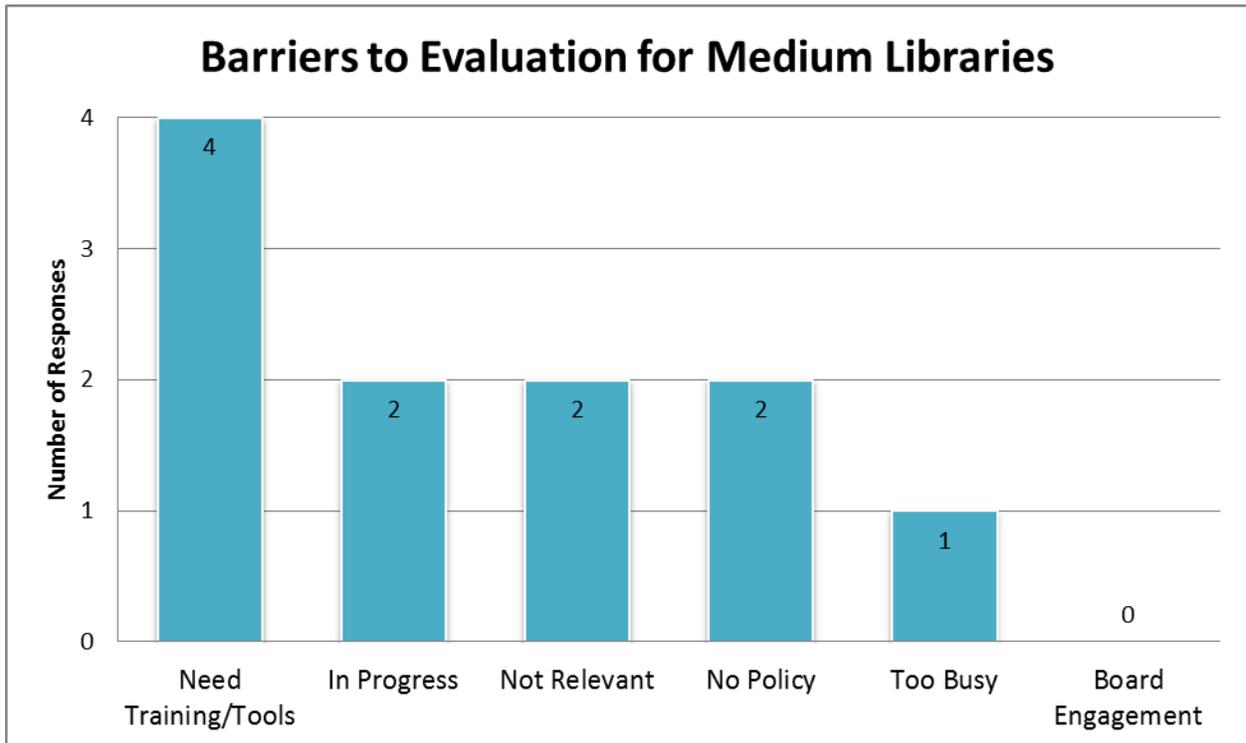
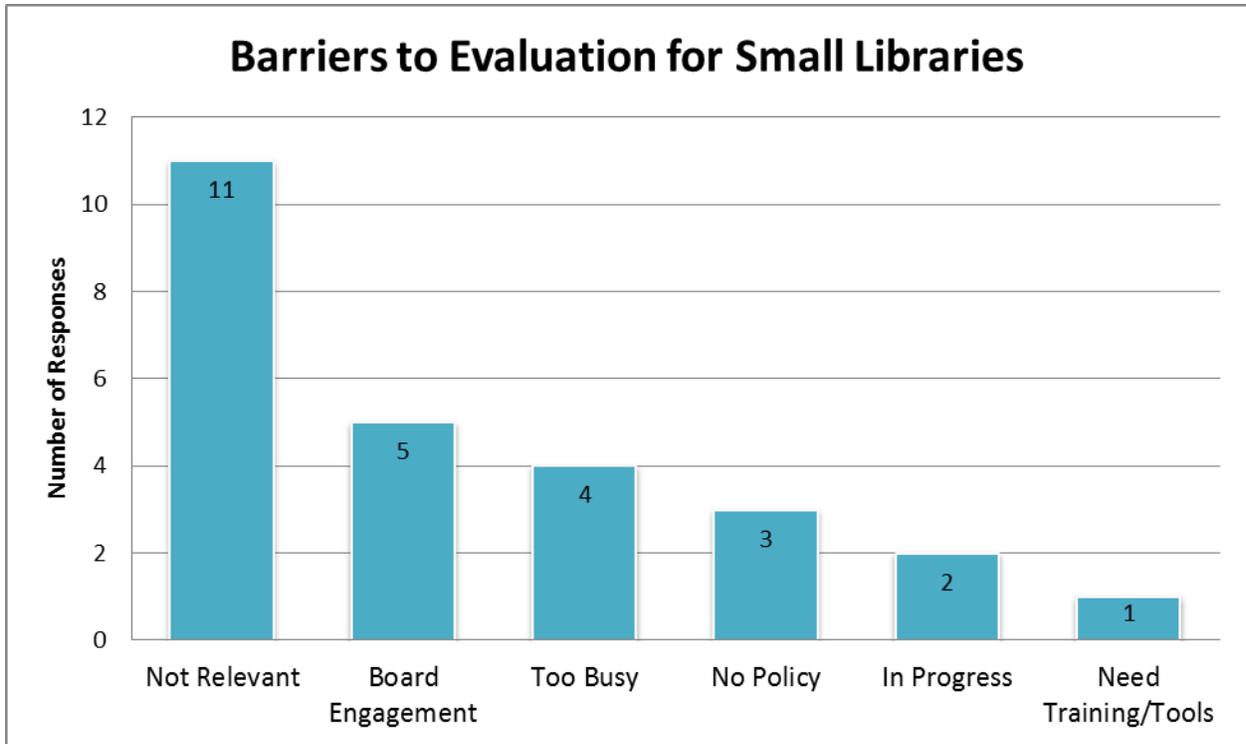
From the open ended question “What is the most significant barrier to using Annual Trustee Evaluations, Annual Board Performance Evaluations, or Annual Chief Librarian/Director Performance Evaluations?” six categories of answers emerged: too busy, no policy in place,

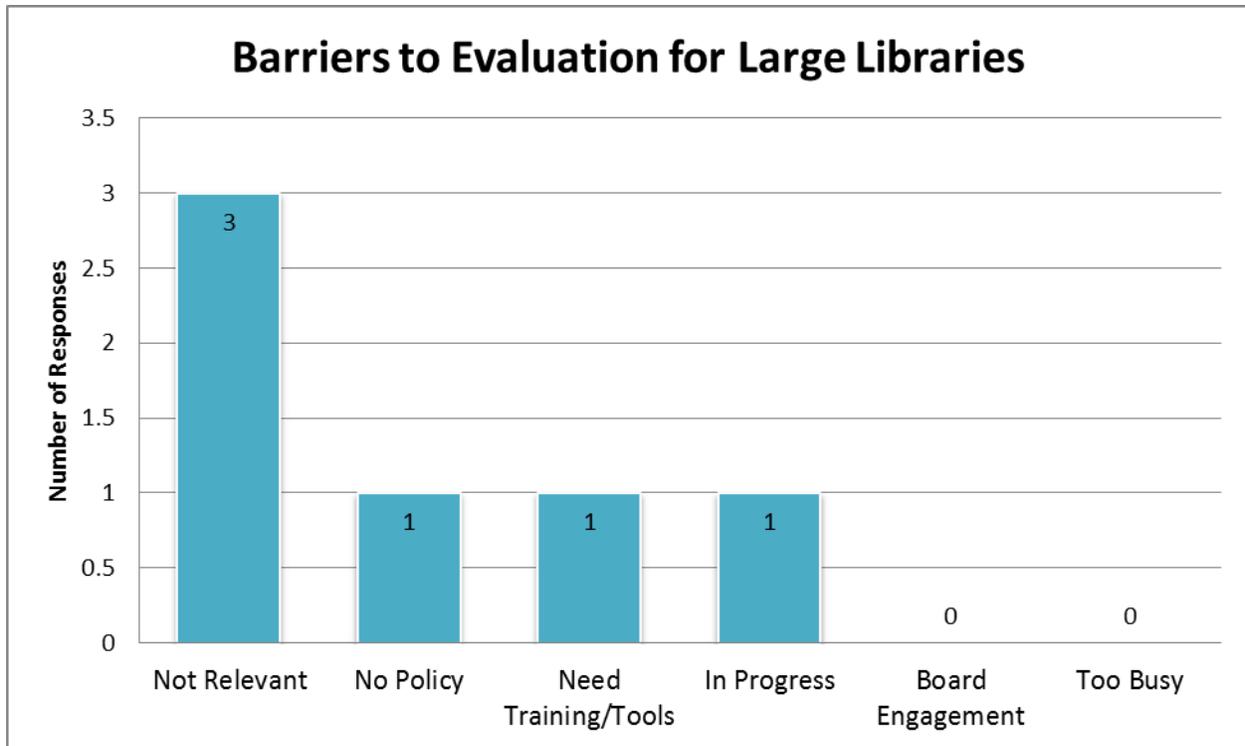
need training or tools, board engagement, not relevant, or developing evaluation tools is in progress.

The largest number of responses appears in the Not Relevant category. This can be either because the library board already conducts these annual evaluations or because the library is very small. Further analysis may provide additional insight.

Libraries of different size categories reported different barriers to evaluation as seen below.

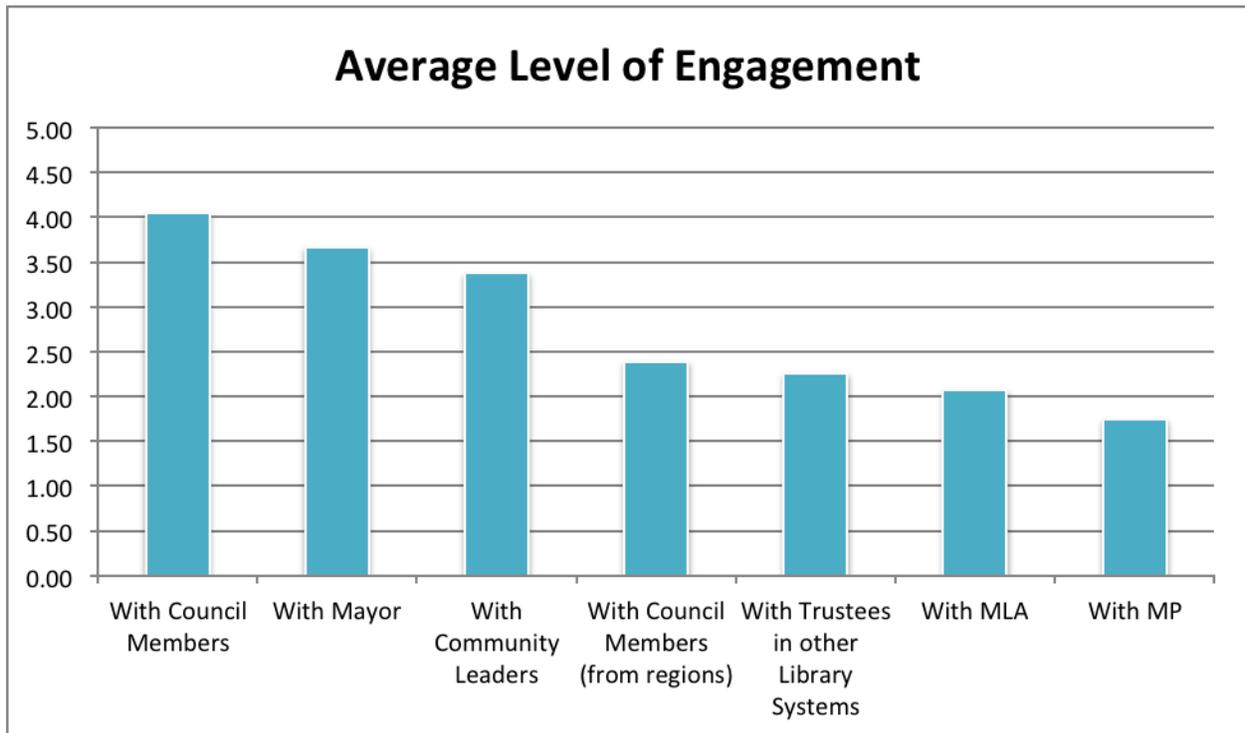






Engagement with Stakeholders

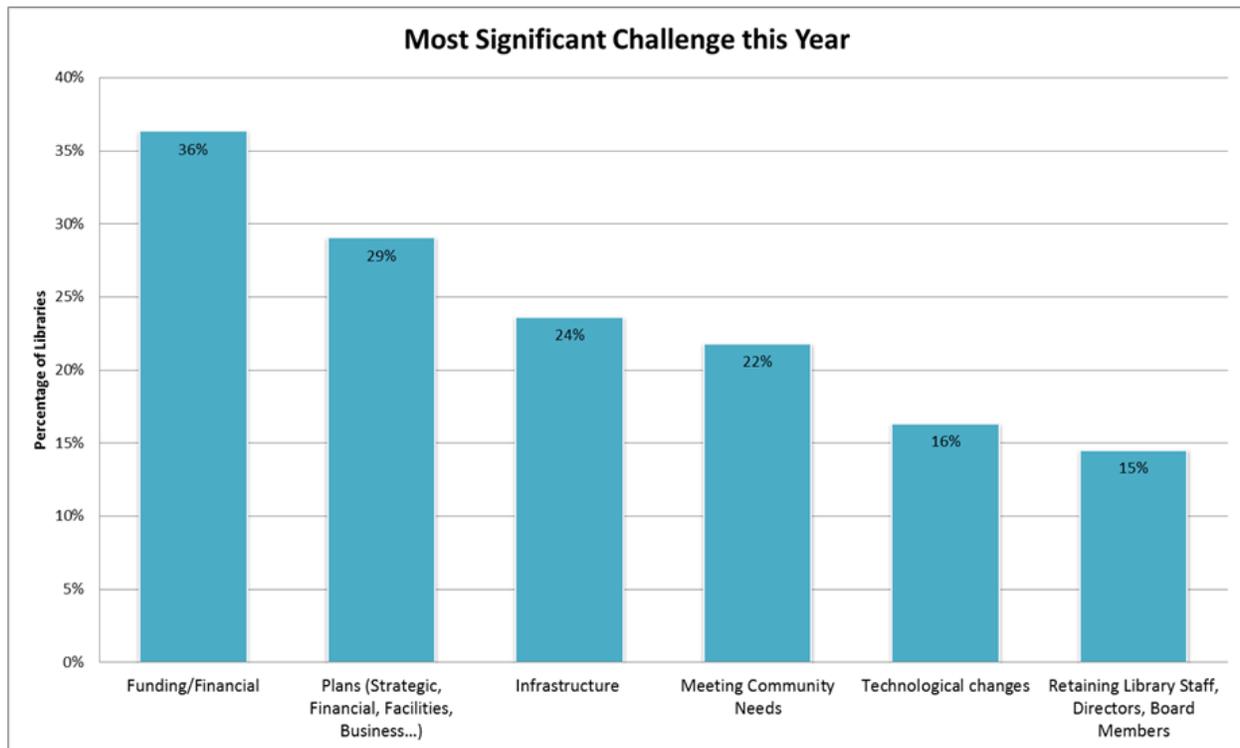
This question asked if relationships with various stakeholders were High (relationships are well-established, scored 5), Medium (relationships are in place and more engagement is taking place, scored 3), or Low (relationships are in progress, scored 1). The responses were averaged. Local/municipal relationships are strongest. All others are not as well established.

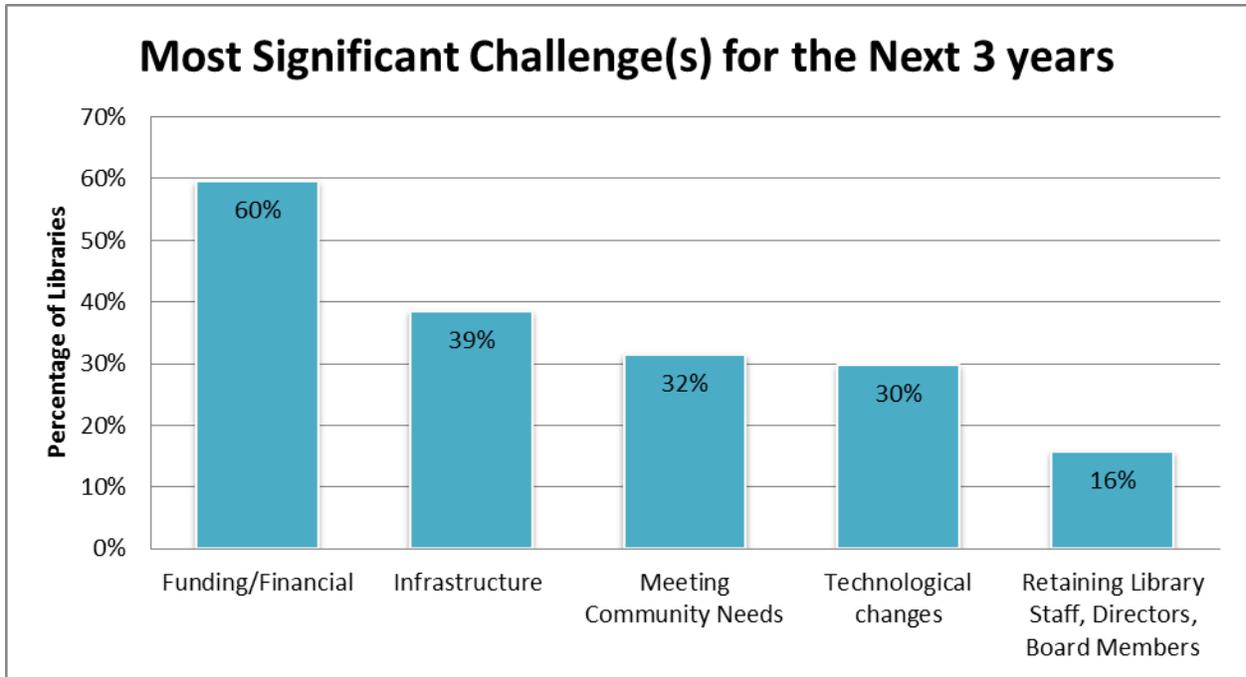


Anticipated Challenges

At the end of the survey respondents were asked, in an open-ended question, what they saw the most significant challenges are for this year, and then the next three years. Although 29% of the responses for the next year referred to planning via the development of strategic plans or other types of plans, no one considered this an issue over the next three years. We do not know whether this is because all responders believe that they will have completed their planning documents or that they believe that there are other issues/items that are more important/significant.

We also note that the relative challenges do not change over the next three years, just the intensity or importance.





Appendix A

Building the Future: Infrastructure Study of British Columbia Public Libraries

The first phase of the research project *Building the Future: Infrastructure Study of British Columbia Public Libraries* was completed in June 2009 and is available on the BCLTA website: <http://www.bclta.ca/member-services/bclta-surveys>

The study documented public library infrastructure in British Columbia, capturing the condition of existing public library facilities and identifying future needs. BCLTA, as sponsor, committed to sharing this information with Trustees across the province and aims to assist public library boards and their stakeholders to formulate plans for community capital investment.

Phase 2, the subject of this executive summary, was completed in April 2011. An online survey was administered March 9 through March 25, 2011 to all public library systems in British Columbia. The survey included two sections to gather information about ongoing and anticipated infrastructure upgrades, as well as their funding source. The final section of the survey identified the most significant challenges for public library facilities in priority order.

High response rates were achieved in Phase 1 and Phase 2 of the research project: 88.7% of public library systems participated in 2009 and 83.1% in 2011.

The issue selected as the number one priority in both 2009 and 2011 for public library systems in BC: *insufficient capital funding for facilities renewal*.

Results: top three challenges facing public library facilities

1. Inadequate public space (program areas): in 2009 and 2011
2. Inadequate space for collections: in 2009 and 2011
3. Inadequate public space (seating areas) in 2011; Too few power outlets for public laptop use in 2009

Phase 2 (2011) calculation of infrastructure needs:

- 51% (30 of 59) of systems had a result indicating existing infrastructure would meet 71 to 100% of future growth needs by 2021.
- 42% (25 of 59) of systems had a result indicating existing infrastructure would meet between 41 to 70% of future growth needs by 2021.
- 7% (4 of 59) of systems had a result indicating existing infrastructure would meet less than 40% of future growth needs by 2021.
- Primary data source: BC Public Libraries Statistics 2009 (PLSB)

- Significant contributions of original data were provided by public library systems throughout the province