

# STRATEGIC PLAN

## 2021-2024

Leading and inspiring the growth and innovation of the library and information services sector.

# OLA Strategic Plan 2021-2024

## **Message from the Chair & Executive Director**

### OUR HISTORY

Founded in 1900, the Ontario Library Association (OLA) is the oldest continually operating non-profit library association in Canada. With approximately 4,000 members, the association is a platform to share experiences and expertise while creating innovative solutions in an ever-changing environment. OLA provides opportunities for learning, networking, recognizing, influencing, and celebrating within the library world.

OLA members are from public, academic, school, government, and special libraries or are students and job seekers. They are experts in research, curating information and ideas, and in the delivery of educational opportunities. Members participate in the association to develop library and information services that support Canadians in their pursuit of education, employment, and cultural interests.

OLA partners with a range of library associations and organizations to strengthen and support libraries and the people who work for them.

### OUR PLAN

In 2020 a global pandemic began that changed how people live and work. This strategic plan will be extraordinary due to the impact of the global pandemic (since March 2020), and the anticipated continuing effects over the next 2 – 3 years.

The [OLA Strategic Planning Policy and Procedure](#) stipulates a 4-year duration. Due to the exceptional time, we find ourselves in, the OLA Board has approved a three-year duration with an option to extend by one year.

Our [Strategic Priorities](#) will guide our actions until 2024:

1. Equity, Diversity & Inclusion
2. Advocacy and Leadership
3. Membership & Engagement
4. A Profession of Continual Learning
5. Organizational Innovation and Sustainability

### OUR FINDINGS: WHAT CONSULTATIONS TOLD US

The world is changing around us, driving the need for us to think strategically about our future. In August 2021, a survey was distributed to members to provide feedback on the association's strategic direction (394 complete responses). The SWOT analysis (Strength-Weaknesses-Opportunity-Threats) and the survey revealed several key themes, such as

emerging priorities and trends for our membership. Consultations with our members, partners and our staff team revealed:

- Equity, Diversity, Inclusion and decolonization: as an organization, as a profession, in library service delivery, programming, spaces and collections.
- Advocacy across library sectors.
- Member community and services: building OLA's membership, developing opportunities for membership collaboration, virtual connection and professional development.



**Andrea Cecchetto,**  
2021 Board President



**Shelagh Paterson,**  
Executive Director

## A new framework for OLA’s key Strategies

In the summer of 2021, OLA embarked on a robust strategic planning effort through a process that engaged members, staff, divisional councils, board members, partners and leading voices in the library field, and with the help of Thomas Plant, consultant with Management Advisory Services (pro-bono consulting service for non-profits), a Strategic Planning Advisory Committee of the Board provided guidance and oversight into the planning process.

**VISION:** Leading and inspiring the growth and innovation of the library and information services sector.

**MISSION:** We empower our members in the library and information services sector to build informed, participatory, and inclusive communities through:

**Research**

**Advocacy**

**Education**

**Partnership**

## VALUES

Our values have stood the test of time and continue to guide us in our work.

### RESPONSIVENESS AND AWARENESS

Our Association is responsive by connecting people to people, and people to ideas. In addition, it empowers our members by providing a platform for education and awareness of important issues. Members are encouraged to develop their own perspectives and views on critical issues and events.

### INTELLECTUAL FREEDOM

Our Association upholds intellectual freedom and open, equitable access to library resources as basic tenets of our democratic society.

### DIVERSITY

Our Association has a shared responsibility to support an inclusive environment within the profession and throughout the community with the provision of library resources and services that meet the needs of all library users.

### LITERACY AND LIFELONG LEARNING

Our Association supports and cultivates a broad range of literacies and the pursuit of professional and personal learning, thereby improving one's ability to participate meaningfully within an information-based society.

### INNOVATION

Our Association is dedicated to accepting, promoting, and supporting continual advancements in library services while staying up to date with current trends and technologies.

### ACCOUNTABILITY

Our Association believes in open and transparent business practices that clearly demonstrate responsible use of organizational resources for effective and efficient library programs and systems

## Our Strategic Priorities & Goals

On December 1<sup>st</sup>, 2021, the OLA Board approved our Strategic Priorities and Goals.

The illustration below highlights our 5 Strategic Priorities and goals which will guide our actions until 2024.



The infographic features a vertical column of five circular icons on the left, each connected to a corresponding text block on the right by a wavy line. The icons are: 1. A group of three people inside a circle. 2. A megaphone. 3. A thumbs-up icon next to a speech bubble. 4. A profile of a head with gears inside. 5. A lit lightbulb.

**STRATEGIC PRIORITY 1:  
Equity, Diversity & Inclusion**

*Goal 1:* Diversify participation and representation of OLA members. Ensure members who are Black, Indigenous, People of Colour are in leadership and decision-making positions with the association.

*Goal 2:* Create policies, frameworks, education, and resources to guide the association in becoming an equitable, diverse, inclusive, and anti-racist organization.

*Goal 3:* Explore and implement strategies towards diversification of the profession.

**STRATEGIC PRIORITY 2:  
Advocacy & Leadership**

*Goal 1:* Ensure OLA continues to foster strong relationships with the government and other key professional groups to secure support and inform change.

**STRATEGIC PRIORITY 3:  
Membership & Engagement**

*Goal 1:* Recover OLA's membership to pre-pandemic levels by 10% annually.

*Goal 2:* Expand virtual conference and training opportunities to engage members and enhance revenue streams.

**STRATEGIC PRIORITY 4:  
A profession of Continual Learning**

*Goal 1:* Promote a sustainable profession including facilitating an environment that supports mental health.

*Goal 2:* Support members in their understanding and adoption of technological innovation.

*Goal 3:* Seek out and develop strategic alliances and partnerships in supporting continuous learning.

**STRATEGIC PRIORITY 5:  
Organizational Innovation & Sustainability**

*Goal 1:* OLA is a strong and fiscally sustainable organization.

*Goal 2:* Ensure staff support, development, and resiliency in a post-pandemic environment.

*Goal 3:* Re-think and re-design governance to strengthen OLA.

There are overarching principles that will guide how we will critically assess and focus our efforts:

### Equity:

We will ensure our services and activities are provided in a fair manner that is responsive to the diverse needs of our membership. We will aim to address needs and requirements for members and libraries that experience obstacles to full participation and opportunities.

### Measurement:

How do we measure the needs of our members, the reach and success of our programs? We want our actions to be informed on data from our members.

We want to know: where are new graduates employed, how many are joining OLA, how many are volunteering with OLA, how many early career members are accessing educational programs, and what impact does our advocacy work have?

**An Anti-racist organization:**<sup>1</sup> “From Diversity to Antiracism: To combat the systemic legal, social, and institutional constraints that have created barriers to racial equality, we must move beyond a diversity mindset—which may foster tokenism—to an actively antiracist mindset. What is the difference between “diversity” and “antiracism” in the workplace? Ibram X. Kendi defines an antiracist as:

*One who is supporting an antiracist policy through their actions or expressing an antiracist idea...One who is expressing the idea that racial groups are equals and none needs developing and is supporting policy that reduces racial inequality [undefined].*

An organization that is actively antiracist has policies and practices in place that address systemic inequities. Diversity, equity, and inclusion (DEI) efforts (which typically emphasize the D) can be a means to an antiracist end but often do not go far enough.”

## OLA STRATEGIC PRIORITIES, GOALS AND TACTICS

The OLA Strategic plan includes:

- **Strategic priorities:** the focus for the association over the next three-four years.
- **Goals:** the desired outcomes for each strategic priority.
- **Tactics:** how each goal will be accomplished. These are incorporated into staff workplans and are intended to support the work of OLA council and committees with annual reporting to the OLA Board. (Refer to Appendix).

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<sup>1</sup> From Antiracism Toolkit for Organizations, by Toolkits for Equity in Scholarly Publishing Project Volunteers: <https://c4disc.pubpub.org/pub/84y9ozoq/release/2?readingCollection=9a476dc8>

The tactics to support the strategic priorities and goals will be specific to each of the 3-4 years of this strategic plan. Tactics become the foundation for OLA Staff workplans and support the work of OLA member volunteers. The OLA Board will approve tactics each year.

- Year one at March 2022 meeting
- Year two by September 2022
- Year three by September 2023



## **Strategic Priority: Equity, Diversity & Inclusion**

Through our strategic planning consultations, members emphasized the need to focus on equity, diversity, inclusion and decolonization: as an organization, as a profession, in the library sector more generally. Members mentioned specifically: A need for libraries to examine policies, procedures, and practices of libraries through a lens of anti-racism, including a focus on service delivery, programming, collections development.

- A need for libraries to implement the Truth and Reconciliation Commission's Calls to Action.
- The importance of developing accessible library programming, services, spaces, collections, and
- Addressing the lack of diversity of the library profession.

*\*The path forward: Goals and outcomes\**

**Goal 1:** Diversify participation and representation of OLA members. Ensure members who are Black, Indigenous, and People of Colour are in leadership and decision-making positions with the association.

**Goal 2:** Create policies, frameworks, education, and resources to guide the association in becoming an equitable, diverse, inclusive and anti-racist organization.

**Goal 3:** Explore and implement strategies towards diversification of the profession.

What will success look like in the next 3 years?

- OLA has enacted multi-year anti-racism plan for the association, developed with a consultant, and has developed of policies, frameworks, education and resources to guide the organization in its anti-racism goals.
- There is equitable representation of Black, Indigenous, People of Colour in leadership positions within OLA Board, councils and committees.
- OLA removes barriers to participating with OLA.
- OLA is equipped to report on volunteer representation across the Association.
- Relationships with aligned organizations will be in place to support long-term strategies for an equitable and inclusive profession.



## **Strategic Priority: Advocacy & Leadership**

Through our strategic planning consultations, members also emphasized the continued need to advocate for libraries in all sectors. The situation facing school libraries, that have experienced an unparalleled erosion of staff and funding in the past decade is a major concern. With no increase to annual provincial funding for public libraries in over 20 years, the value of the province's investment in public libraries has fallen by over 60%. The situation is even more challenging for public libraries on First Nation reserves, where an unsustainable provincial funding model has left some public libraries on reserve closed or with severely reduced access.

*\*The path forward: Goals and outcomes\**

**Goal 1:** Ensure OLA continues to foster strong relationships with government and other key professional groups to secure support and inform change.

*What will success look like in the next 3 years?*

OLA has consistently advocated and engaged provincial/municipal government on public and school library funding to:

- Increase awareness of and support for Public Libraries on First Nation Reserves based on needs identified by First Nation Public Library leaders.
- Support new public library boards in municipal engagement
- All political parties are aware of and engaged with library sector priorities.
- OLA has engaged and developed relationships with decision makers responsible for school library supports

The library sector is positioned to impact positive societal change:

- Climate change.
- Digital engagement and literacy.
- Intellectual Freedom.

- The Truth and Reconciliation Commission's Calls to Action.
- Anti-racism.

## 3

### **Strategic Priority: Membership & Engagement**

In the past two years, OLA membership levels have decreased across sectors, impacting the reach, revenues and long-term viability of the association. Through our member consultation, we heard an interest in new ways to connect and engage in a virtual context: spaces for membership collaboration, virtual connection and continued professional development.

*\*The path forward: Goals and outcomes\**

**Goal 1:** Recover OLA's membership to pre-pandemic levels by 10% annually.

**Goal 2:** Expand virtual conference and training opportunities to engage members and enhance revenue streams.

What will success look like in the next 3 years?

- OLA membership has increased to pre-pandemic level; the Membership process and categories are streamlined.
- Data from multiple Sector Employment Surveys position us to understand multi-year employment trends of recent graduates from MLIS and Library Technician programs in Ontario.
- The Forest of Reading Festival is re-instated as an in-person event and reaches a wider audience outside of the GTA.
- The OLA website has new functionality and useability.
- Hybrid Super Conference increases engagement and participation from the membership and broader library sector.
- OLA events have equitable participation of speakers from marginalized communities.
- OLA events increased reach and accessibility and include an anti-racism component.

## 4

### **Strategic Priority: A Profession of Continual Learning**

The past two years have been a challenging time, highlighting the importance of collective attention and support of mental health in the profession. Through our strategic planning consultations, members also talked about the need for continuing education and growth as members respond to evolving realities, community needs and making the most of emerging technology.

## \*The path forward: Goals and outcomes\*

**Goal 1:** Promote a sustainable profession including facilitating an environment which supports mental health.

**Goal 2:** Support members in their understanding and adoption of technological innovation.

**Goal 3:** Seek out and develop strategic alliances and partnerships in supporting continuous learning.

### What will success look like in the next 3 years?

- OLA facilitated discussion groups which positioned the association to identify and provide resources to our members to cope in a post pandemic environment.
- OLA members have access to timely resources and training on topics including mental health, technological innovation and climate change.
- Members demonstrate in their involvement with OLA and their professional practice, facility and currency with library technologies and practice.
- OLA members learn from each other through member-led initiatives on how to work, teach and manage in virtual environments.
- OLA members have the skills to respond to the challenges of digital literacy and digital citizenship in or profession.



### **Strategic Priority: Organizational Innovation & Sustainability**

The past two years have been extraordinary, forever changing how organizations work and adapting to a new normal, operating in a constantly evolving environment imposed by the global pandemic. Through our consultations, we heard an interest in ways to diversify our revenues, streamline our processes, and keep up with new and increasing technological innovation.

## \*The path forward: Goals and outcomes\*

**Goal 1:** OLA is a strong and fiscally sustainable organization.

**Goal 2:** Ensure staff support, development, and resiliency in a post pandemic environment.

**Goal 3:** Re-think and re-design governance to strengthen OLA.

## What will success look like in the next 3 years?

- OLA will have recovered the OLA budget to pre-pandemic levels, will have streamlined and implemented technology and processes to enable growth.
- OLA Staff will learn and thrive in their career.
- OLA will have transformed its governance model so that it is accountable and aligned with the purpose of OLA, is nimble, responsive, manages risks, has depth of institutional knowledge and comfort with leadership in decision-making.

## Thank You

This plan would not have come to fruition if it were not for many people who provided a voice and their thoughts in our Strategic Plan development.

**Our members:** Thank you to all our members including divisional councils and committees for their assistance and feedback through surveys and meetings.

**Board of Directors:** Thank you to the 2021 OLA Board, who worked to understand the diversity of our members and the complexity of their needs. With our board's leadership and guidance, our strategic plan was able to be relevant, impactful, and forward-thinking.

**Strategic Planning Advisory Committee:** A special thank you to our Strategic Planning Advisory Committee who provided invaluable information in the formation of this plan.

**Consultant:** Thomas Plant from [Management Advisory service](#). Thomas has over 20 years' experience in municipal government specializing in strategic planning, project management and organizational continuous improvement.

**Our Staff:** A special thank you to all OLA staff that provided a strategic voice and developed the workplan plan to realize the overarching goals and which will guide us over the next three-four years.

# Appendix A: Tactics and Workplan –Year 1

2021-2024 Strategic Priorities	Goals	Year 1 Tactics - August 31, 2022
<p><b>Priority 1. Equity, Diversity &amp; Inclusion</b></p>	<p>1.1 Diversify participation and representation of OLA members. Ensure members who are Black, Indigenous, People of Colour are in leadership and decision-making positions with the association.</p>	<p>Develop a plan and structure for equity work to facilitate membership participation from members who are Black, Indigenous and People of Colour. Collect data on demographics of OLA Leadership and decision-making positions with the goal of increasing representation and board and council. Evaluate which data needs to be held within Association Management system, AWS.</p> <p>Working with consultant, engage in Board education on equity, diversity and inclusion.</p>
	<p>1.2 Create policies, frameworks, education, and resources to guide the association in becoming an equitable, diverse, inclusive and anti-racist organization.</p>	<p>Begin year 1 of a three-year policy review process: Review and revise OLA Super Conference proposal. Review and Revise OLA Code of Conduct. Invite the membership to review and adapt the Code of Conduct as a local resource.</p> <p>Begin year 1 of a two-year EDI education and anti-racist training program for OLA volunteers and members: Education and Training for Forest Committee. Embed training into each OLA</p>
	<p>1.3 Explore and implement strategies towards diversification of the profession.</p>	<p>Consult with members and professional practice to develop a strategy to remove barriers to participating with OLA (membership, volunteering and professional development).</p> <p>Create policy on membership tracking.</p> <p>Evaluate membership database functionality to capture volunteer involvement.</p>

2021-2024 Priorities	Goals	Year 1 Tactics - August 31, 2022
<p><b>Priority 2. Advocacy and Leadership</b></p>	<p>Goal 2.1: Ensure OLA continues to foster strong relationships with government and other key professional groups to secure support and inform change.</p>	<p>Advocate and engage provincial/municipal government on public and school library funding.                      Create and deploy the provincial and municipal election strategy to seek increased support for public and school libraries.                      Ensure OLA members are represented at the annual provincial budget consultation (years 1 – 3).                      Ensure all political parties are aware of and engaged with library sector priorities.                      Consult with leaders of First Nation Public Libraries to inform advocacy strategy specifically for public libraries on First Nation reserve.                      Identify further tactics required to advocate for broadband infrastructure for rural and northern and First Nations communities.</p> <hr/> <p>Increase support for School Libraries:                      Track and promote any advancements on the expanded accountability for the school library investment ministry directive.                      Develop a stakeholder plan that engages decision makers responsible for local support of school libraries. (For example, education associations, school board trustees, Directors of Education, Principal Councils, etc.).</p>

2021-2024 Strategic Priorities	Goals	Year 1 Tactics - August 31, 2022
<p><b>Priority 3: Membership &amp; Engagement</b></p>	<p>Goal 3.1 Recover OLA's membership to pre-pandemic levels by 10% annually.</p>	<p>Create a revenue recovery and expansion strategy for membership: Create a focus group of non-members who are employed in the library sector to determine barriers to membership.                      Research strategy to re-connect with lapsed members                      Investigate strategies to simplify the membership process and categories                      Identify and deploy the process to streamline the new membership database (remove duplicates, anomalies, errors, organization of parent</p> <hr/> <p>Increase staff training to support membership recovery including: Staff training in user experience (UX) and content writing to improve quality of member communications (website, newsletter, social media).</p> <hr/> <p><b>Evaluate member communications:</b> Conduct an audit of OLA-run and volunteer-run social media channels and review the Social Media Policy. Verify and secure social media accounts. Review and revise Open Shelf publishing schedule and volunteer engagement to encourage wider</p> <hr/> <p>Deploy the second Sector Employment Survey to track employment trends of recent graduates from MLIS and Library Technician programs in Ontario.</p>
	<p>Goal 3.2 Expand virtual conference and training opportunities to engage members and enhance revenue streams.</p>	<p>Plan for a 2023 hybrid Super Conference to increase engagement and participation from the membership and broader library sector.</p> <hr/> <p>Ensure OLA events maintain a virtual element to increase reach and accessibility.</p> <hr/> <p>Develop virtual Forest of Reading celebration to ensure we are reaching a wider audience outside of the GTA Festival.</p> <hr/> <p>Develop metrics to track keynote speakers across all OLA events to ensure equitable participation of speakers from marginalized communities.</p>

2021-2024 Strategic Priorities	Goals	Year 1 Tactics - August 31, 2022
Priority 4. A Profession of Continual Learning	Goal 4.1 Promote a sustainable profession including facilitating an environment which supports mental health.	<b>Identify resources for members to cope with the pandemic /post pandemic.</b> Identify resources by types of roles in libraries, for example, front line staff, senior managers etc. Facilitate connections between members (chats, discussion groups).
	Goal 4.2 Support members in their understanding and adoption of technological innovation.	Learn about member's technological learning needs.
	Goal 4.3 Seek out and develop strategic alliances and partnerships in supporting continuous learning.	Establish a working group on Libraries and Climate Change.
		Revise and re-publish Leadership by Design: Cut to the Chase

2021-2024 Strategic Priorities	Goals	Year 1 Tactics - August 31, 2022
<p><b>Priority 5: Organizational Innovation &amp; Sustainability</b></p>	<p>Goal 5.1: OLA is a strong and fiscally sustainable organization.</p>	<p><b>(Years 1 – 2) Develop and Implement Revenue recovery strategy for</b>                      Forest of Reading,                      Education Institute                      The Library Marketplace</p> <hr/> <p>Improve collaboration, communication, resiliency, efficiency, and synergy to further develop workflows, process for each department (Forest of Reading, Membership, Education Institute, TLM, Events, Communications and Operations)</p> <hr/> <p>Secure an auditing firm; issue an RFP, select a firm with board approval.</p> <hr/> <p>Research and develop an appropriate expense and revenue plan for the creation of a hybrid OLA Super Conference. (Refer to Strategic Priority 3)</p>
	<p>Goal 5.2: Ensure staff support, development, and resiliency in a post pandemic environment.</p>	<p><b>Develop and implement an OLA staff training &amp; education plan</b>                      Implement a remote work framework (Work from Home principles) for OLA staff.                      Develop and begin to deliver Mental Health support resources for staff                      Investigate a customer service training program.</p>
	<p>Goal 5.3: Re-think and re-design governance to strengthen OLA.</p>	<p><b>Re-Imagine governance for the association in line with goals set out in Priority 1, including:</b>                      - Advanced Board, Council training.</p> <hr/> <p>Develop a transformation plan based on the outcomes of the Re-Imagining Governance workshops. Plan includes establishing a timeline, identifying the board and governance structure, researching consensus and decision-making processes, communication and engagement with councils and committees, assessment of governance support materials, audit of policies and legal requirements in relation to governance transformation and governance training plan.</p>