



ExLibrisNews

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President's Message

1997 GET-TOGETHER IN KITCHENER

We look forward to seeing you at our annual get-together in November, which will be held this year in the Kitchener Public Library. Vice-President Brian Land has organized an interesting program that leaves us plenty of time to visit and reminisce. Participants will receive a report on the Ottawa Luncheon meeting in September as well as our annual reports. The registration form for November is enclosed with this issue of the News.

The main thrust of ELA activities this year is the compilation of a list of locations where documents pertaining to library history can be found. They range from major institutions such as the National Library and other libraries to schools of information science, archives and private collections. Several items came to light in the last issue of *Ex Libris News*. The article on E.C. Kyte revealed that his papers are at Queen's University, and the review of *Readings in Canadian Library History 2* mentioned other information sources for library history. At the June meeting of the Board an ad hoc committee consisting of Jean Orpwood (chair), Elizabeth Ketchum, Paula de Ronde and Jean Weihs was appointed "to examine the project's extent and feasibility". We are anxious to identify and locate these sources. If you are aware of any hiding-places where such collections are held, please contact Jean Orpwood or another member of the committee.

A SALUTE TO OUR PRODUCTION AND DESIGN EDITORS

This issue of *Ex Libris News* is the first produced for us by the Ontario Library Association. Les Fowlie and Raul Regalado, who have been responsible for

the production and design of recent issues, wished to relinquish this duty. We express our thanks to Les and Raul for the many hours they spent on our behalf. We would also like to thank Janette White, who researched and compiled the "Milestones" section for a number of years.

ORGANIZATIONAL NOTES

The Responsibility Statements for Board members were compiled by Past-President John Wilkinson and approved at the Board's September meeting. These will be of assistance to all members of the Board, especially new members, in clarifying the duties of each committee and officer.

ELA MEMBERSHIP

The membership of ELA remains constant - approximately 175. Clearly, there are more retirees than members. The membership chair, John Ball, and the Membership Committee are constantly inviting persons to join our organization. They also want to know why some do not renew their membership annually. Although we are scattered across the nation, I hope we are not only an association of retired librarians but also an organization of persons who are still vitally interested in the profession. While the articles in the News keep us up-to-date on members' activities and provide us with the opportunity to reminisce about the times when we held positions of trust and responsibility, they can also keep us informed on what is happening in the world of information science. Please take it upon yourself to assist in expanding ELA's membership. ♦

Erich Schultz
President

This fall, we continue the discussions introduced at last year's annual get-together on how libraries are responding to internal and external changes in their environment. The challenges confronting librarians today are even more serious than the continuous downsizing operations of the last two decades. Triggered by cuts in transfer payments to provinces, costs are being down-loaded to the municipal level with significant impact on public expenditures. At the same time, the Gingrich phenomenon still is having its impact on policies in Canada. The trend towards amalgamation is also being felt, arousing concern that local issues will not be addressed.

Concurrently, library boards face elimination or serious erosion of their traditional functions. Just one example: in its latest issue, *APLA Bulletin* reports that Bill 89, "just passed by the New Brunswick Legislature, makes some fundamental changes to the Libraries Act. As well as eliminating regional library boards, it removes the definition of the professional librarian from the Act, and neither the New Brunswick Library System nor its director is mentioned." None of the changes reflects proposals by a recent task force on libraries set up by the province.

To follow-up the panel discussions on "The Future of Libraries" held at last year's annual gathering, this issue features several articles relevant to that topic. An historical overview of library boards in Ontario by Lorne Bruce is followed by information on Bill 109. We also present a discussion of municipal merging in Nova Scotia and its impact on public libraries; and Jane Horrocks looks at the effect of the new publishing technologies on library collections and education.

In the "As We Were" department, we are pleased to present Pearce Penney's history of public library service in Newfoundland, and Clara Miller's memories of one of Canada's major corporate libraries.

We welcome further contributions from readers who may wish to share their information, opinions or experience. If you have an article you would like to see published, a news item you think we should run, an idea you wish to discuss, a note for our "Milestones" section -- please contact the editor by phone or by mail. (Questions regarding subscriptions to *Ex Libris News*, back issues, etc., should be addressed to the ELA office at FIS, University of Toronto.)

Library Boards in Ontario: An Historical Perspective

by Lorne Bruce

Major revisions have been made to the *Ontario Public Libraries Act* on four previous occasions during this century: in 1909, 1920, 1966 and 1984. In another published article (1), I wrote that, despite the fact that many of the original prerogatives and legislative supports for boards had disappeared, the board form of governance would likely continue because it was a longstanding political tradition in Ontario communities. Now, in 1997, sweeping changes are being made to the Act, yet appointed library boards will remain, albeit with greatly diminished authority and powers.

From an historical perspective, the continuance and transformation of library boards raise interesting questions about the role of citizen participation in local government and the persistence of appointed bodies with limited autonomy. For more than a century, library boards seem to have satisfied Ontario's citizens that they were useful and appropriate semi-independent bodies which intersected with local/provincial roles in the delivery of library service. I can only touch on a few major points, but I would like to note that my discussion focuses on local municipalities, not larger county or regional library boards which came into being after WWII, smaller boards in police villages and school areas, or association boards that existed until 1966.

THE ACT OF 1920

The prototypical local library board dates back to 1882, but most Ontarians will be familiar with the characteristics that were enshrined in the 1920 Act. Readers in western provinces may be familiar with some of its provisions because Ontario's development influenced legislation in British Columbia (1891), Manitoba (1899), Saskatchewan (1906) and Alberta (1907). In this archetypical arrangement, library boards were semi-autonomous appointed bodies

coexisting with municipal councils and local school boards that were responsible for selecting members. These boards had distinctive features and powers:

- nine-member boards were created by a petition/referendum process whereby local ratepayers voted to establish a board by a process set out in the library act;
- municipal councillors, the mayor excepted, were not eligible for appointment;
- the members' terms of office were staggered over 2 or 3 years, providing some continuity (and, in some cases, long-term inertia);
- boards were responsible for hiring officers who were identified in the act, e.g., a librarian;
- boards were required to submit annual estimates to council for approval prior to March 1st. They could demand a per capita levy up to a certain maximum and above a specified minimum (the "library rate" was fixed at fifty cents in 1920);
- boards could request council to raise money for a site, buildings or books, by an issue of debentures and refer the matter to electors for settlement;
- the Minister of Education required boards to submit an annual report;
- an audited statement and some board policies were subject to review by the Minister of Education (age limitations for children, for example);
- the Department of Education paid a conditional provincial grant detailed by regulation to boards.

Of course, the legislative definitions, processes, and regulations covering many of these elements evolved after 1920 as more and better services were provided. Promising plans for public library service were published in 1958 (the Wallace report) and 1964 (the St. John report), and the Ontario Library

Association lobbied for improvements throughout the 1950s and 1960s.

THE 1966 LEGISLATION

In the 1966 Act, new provisions were introduced to reflect the political and economic changes that transformed postwar Ontario. The petition/referendum disappeared, mostly because free library service had been achieved in almost all villages, towns and cities, and municipal elections were no longer held on an annual basis. The municipal per capita library rate was abolished, as it had come to be viewed as a barrier to growth rather than as a guarantee of secure funding. Only in communities with populations over 10,000 did appointments continue to be shared and the nine-member board remain standard. A few dated Ministry of Education requirements and irksome regulations were withdrawn. The primary focus for 1966 legislation was the formation of large units of service (e.g., the abolition of association public libraries), cooperative efforts (especially regional libraries) and the role of the relatively new Provincial Library Service. The authority and power wielded by library boards were not a matter a concern at this time.

At the beginning of the 1970s, however, the autonomy of special-purpose bodies in local government began to receive more attention. After 1965, local government underwent scrutiny and enlargement: school boards were consolidated, regional government introduced, the mandate of provincial ministries expanded, and county restructuring reports undertaken. Independent boards may hamper plans to coordinate services at the local level in a host of ways; these became evident during restructuring exercises. The most common concerns are simplification of administration and accountability to elected bodies. The issue of deconditioning library grants to municipal councils to simplify transfers, the abolition of school appointments by making all selections by councils, the elimination of rotating appointments by having members' terms concurrent with the life of council, and the power of councils to retain complete control over the estimates and expenditures were raised many times in the 1970s and 1980s. A

few municipal corporations (e.g., London in 1978 and Hamilton in 1986) attempted to pass private members' bills to attain more control, but the provincial government normally required agreement by all local parties before this could be achieved.

THE 70S AND 80S

At the provincial level, the long connection libraries had with the Department of Education was severed in 1972. Since then, a provincial library agency has been assigned to successive ministries in the "cultural sector" that participated in various special-program and planning and restructuring efforts and moved the provincial focus away from the core services libraries provide. Two provincial library studies of note were conducted after 1966: the Bowron report in 1976 and the public libraries program review begun in 1980. Both studies concentrated on cooperative efforts, although some aspects of the local council-board debates that were taking place did receive attention.

In the 1984 legislative revisions, school boards could continue to make suggestions for appointments, but the authority for all selections rested with municipal councils. The staggered mode of appointment ceased. Annual estimates now were to be approved by council which could authorize expenditure variations with or without acceptance by the board. Requests for library debentures required council and Ontario Municipal Board approval. The underlying authority and power of semi-autonomous library boards had been curbed considerably. At the same time, the number of regional library boards was reduced and their powers redefined.

THE CURRENT LEGISLATION

The most recent 1997 proposals in Bill 109 are the culmination of a series of changes that began in February 1993, when authority for public library legislation was transferred to another new ministry, the Ministry of Culture, Tourism and Recreation. The most important study to appear at this time was the 1994 report of the Provincial-Municipal Task Force established under the municipal sector framework agreement to the Social Contract regarding areas where duplication and overlap

existed. Against a backdrop of reduced government expenditure and a penchant for rethinking government structures in the 1990s, it made a number of recommendations regarding public library finance, service and administration that challenged the status quo.

In autumn 1995, the Libraries and Community Information Branch was dissolved and ministerial direction for provincial library programs transferred to the Cultural Partnerships Branch of the Ministry of Citizenship, Culture and Recreation. As well, the Savings and Restructuring Act (which proposed to allow municipalities to charge fees for local services and to dissolve or change local boards) and a ministry decision to cut approximately 40% of its conditional grant to libraries, received considerable discussion. After the consultation, the final letter of the Who Does What Panel, chaired by David Crombie, advising the government on restructuring municipal aspects of public libraries, was released on 20 December 1996. The Crombie letter was succinct about the future of library boards:

"It is the view of the Sub-panel on Municipal Administration that municipalities should have full control over the local library function. This includes the responsibility to decide how the library service will be governed, to develop the library service policies and programs, to determine the most appropriate administrative structure, as well as to plan for the approve library budgets".

In January 1997, Bill 109 was introduced and at this point September 1997) is ready for third reading. It has retained local library boards, but many aspects of their composition and operation are targeted for change. Bill 109 mandates that local municipal bylaws will determine board size, composition, qualifications, term of office, mode of appointment and reappointment of members, reimbursement for service, and other details such as disqualification. The new act will ensure that boards will have at least three members but there is no legislative provision for retention of citizen appointments. The Ministry will offer guidelines for local bylaws and its conditional grant to boards will be assumed by municipalities as part of an unprecedented transfer of funding responsibility.

Obviously, the rationale that underpinned boards for a century has disappeared. Now boards will face the challenge of a new political environment which is itself the consequence of reduced public-sector funding at all levels, constant governmental reorganization and the advance of new technologies. A new era is emerging for boards. No longer will library service be funded by government simply on the basis of "public good" or "economies of scale." New digital transmission of information promises greater savings and even wider public distribution. The local library is but one of many information providers contending for public consumption. Boards will have to develop new strategies and new arguments to municipal

councils to justify annual expenditures. They will have to do this with less authority, power and funding than in the past because they have become administrative municipal entities, not semi-autonomous corporate bodies providing basic services with provincial and municipal revenue sources.

In many ways, the challenges that contemporary boards must address are greater than ever, in part because public reliance on governmental agencies has eroded steadily in the 1990s, and trustees' ability to create solutions is restricted by their consignment to the local administrative level. Future solutions to public information needs in Ontario communities will depend on how well boards adapt to new technolo-

gies and information policies developed in the private and public sector, usually with limited input from local governments and often from many different perspectives and responses. ♦

(1) Bruce, Lorne D. "Local Government and Library Boards in Ontario, 1882-1945." *Readings in Canadian Library History* 2, CLA, 1996, pp. 119-151.

Lorne Bruce is Collections Services librarian at the University of Guelph.

Ontario's Bill 109

The following Brief was submitted by the Chief Executives of Large Public Libraries of Ontario (CELPLO) to the General Government Committee, Province of Ontario, April 8, 1997. It was prepared by the CEOs of three public libraries: Barbara Clubb (Ottawa), Jennifer Milne (Etobicoke), and Reed Osborne (London), Chair. (We thank Reed Osborne and Jan White for sending us this document.)

**GENERAL GOVERNMENT
COMMITTEE
BILL 109,
LOCAL CONTROL OF
PUBLIC LIBRARIES ACT,
1997
BRIEF BY
CHIEF EXECUTIVES OF
LARGE PUBLIC LIBRARIES
OF ONTARIO**

April 8, 1997
London, Ontario

The Chief Executives of Large Public Libraries of Ontario (CELPLO) are the library CEOs in Ontario municipalities serving more than 100,000 population.

Our 25 libraries serve 5.5 million Ontarians, over half the population of the Province.

Ontario's libraries play an important role in the economic and educational life of the province. Ontarians use libraries for a host of business and personal reasons 70 million times annually. Forty-three million or 60% of these transactions occur in CELPLO libraries. Likewise, 60% of circulation and 70% of Ontario's library information requests happen in these larger urban libraries.

GOVERNANCE

As chief executives of public libraries, our membership is committed to public service, managerial excellence and to efficient effective service provided at a reasonable cost to the taxpayer.

The question of governance is central to the success of these themes. In their letter to the Minister of Municipal Affairs and Housing of last December, David Crombie and Peter Meyboom of the Who Does What Panel acknowledge that Ontario's Public Library system is "among the best in the world". We are gratified they have recognized the excellence of Ontario's public libraries and urge the government of Ontario to continue to support the public library system.

On the issue of governance, we urge the Committee not to confuse administration and governance. In recent years among our members, there has been a move toward merging some administrative services such as human resources, maintenance and accounting with the parent municipality. These developments have produced significant savings for the libraries and municipalities that have made these mergers. The point we wish to make is that these savings were achieved under the 1984 Public Libraries Act.

The board model has worked well for Ontario's public libraries and CELPLO is pleased the boards are retained in Bill 109. The appointment of volunteer citizens, people of stature and accomplishment in their community, is undeniably a factor in the success of Ontario's public libraries. A strong citizen-based board is a community advocate for library services.

We offer the foregoing comments with the proviso that among our group there is a wide diversity of opinion on the governance issue, ranging from the status quo to a "no board" option. The latter option exists presently in Ontario, is consistent with the practice and trends in other jurisdictions, and is compatible with the goals of less govern-

ment and local control.

There is some concern among our members that token boards consisting, perhaps, of the mayor and/or municipal CEO could be appointed under Bill 109. CELPO urges the committee to amend Bill 109 to ensure that true governing boards including citizen representation are created. True governing boards appear to be the intention of Bill 109, however, the most basic framework of board composition is missing. It is suggested the Committee be guided by the Ontario Corporation Act which provides for a minimum of three members on a board of directors.

It is recommended that Bill 109 be amended to establish the minimum size of a board, that such a board be consistent with the Corporations Act and further require the presence of citizen representation.

FINANCIAL SUPPORT

Over a period of many years, our membership has watched the continuing decline of the provincial household grant for library service as a proportion of local library revenue. We acknowledge that libraries are a local service and the local level is best placed to manage and operate libraries. We acknowledge that the concept of disentanglement has an appeal for those who would simplify the complexity of public service.

However, we also agree with the Who Does What Panel, "that the province has a fundamental interest in literacy and equal access to information for all Ontario residents." Literacy, equal access and the educational role of libraries are the broader concepts of service that require the committed involvement of the senior level of government. Unlike many other provinces, Ontario has no provincial library. Our provincial library is in fact the distributed network of more than 1,200 local libraries across the province. Provincial funding and support is essential for the effective functioning of this network, especially but not exclusively as it relates to the smaller and more geographically isolated and First Nations libraries.

CELPLO believes the provincial interest must extend beyond the creation and maintenance of networks through inter library loan and a provincially supported technology infrastructure. The Province

has an important leadership role to support research and development through special projects and grants.

Bill 109 appears to endorse this view by the inclusion of a stirring preamble to the legislation. We would suggest that the sentiments of the preamble would carry more authority if backed by financial support. Bill 109 deletes Section 30 of the Public Libraries Act which provides for grants to library boards.

We are concerned that the downloading proposals announced by the Government during Mega week, coupled with grant cutbacks, offers no reassurance to cash-strapped libraries that former education funds will be reallocated to public library boards.

It is recommended that Section 30 of the Public Libraries Act be retained providing for grants to public library boards and that the provincial per household grant continue to be made.

It is recommended that a program of sustained funding for the work of the Ontario Library Service and a Ministry unit that can act effectively and speak articulately for provincial library interests at provincial, federal and international levels.

FEEES

The issue of user fees has long divided the library community. As librarians our managers have struggled with the dilemma:

- as librarians we are committed to universal open access to information for all our clients;
- we are inspired by the concept of the free public library and many of us see a deep commitment to this idea in our communities;
- we feel that fees are unacceptable double taxation;
- we know that fees are not a financial panacea because there is experience and research to indicate such revenue is modest;
- when we contemplate fees, we do so on the understanding there will be exceptions for those who truly cannot afford to pay;
- yet, as managers, we are trying to restructure and reinvent our institutions in a world of declining resources, and are striving to maximize sources of revenue.

We recognize that fees are an option for revenue generation. Although CELPLO members hold a diversity of opinion on this issue, our association adopted a position some years ago acknowledging that local authorities ought to determine the kind and level of user fees appropriate or acceptable to local circumstances. Accordingly, we have reservations with the Government's approach.

- Ontario Regulation 26/96 under the Municipal Act is limiting in that it will permit the imposition of charges only for library collections by format. Prior to the promulgation of Regulation 976 under the Public Libraries Act, 1984, many libraries did charge for the lending of 16mm films, videotapes and other audiovisual materials. Those libraries raised revenue which often failed to outweigh the costs of overhead.
- Regulation 26 appears to steer a middle course. By requiring that print materials be provided at no charge, the intention is to satisfy the proponents of the historic free service mandate. By permitting fees in a restricted way, lip service is paid to the idea that grant cuts can be recovered through fees. This approach will satisfy no one.
- Public libraries must continue to support Ontarians in a knowledge-based society. It is clearly evident that the knowledge-base is rapidly becoming predominantly electronic-based, not print-based. The restriction of fees to information sources reliant on newer technologies is contrary to the second purpose of Bill 109.
- In addition to permitting charging by format or media, Bill 109 precludes any general membership fee. Membership fees have been permitted in Alberta for some years now and the experience would indicate that such fees may generate 3-4% of total revenue. It is acknowledged that the concept of a membership fee is seen by many as contrary to the historic concept of the free public library. Nevertheless, some jurisdictions may consider a modest membership fee to be an egalitarian

measure and an acceptable compromise in a community.

In response to declining government funding, we are noting among our members some successful fundraising endeavours. Although no library is optimistic enough to expect fundraising to recoup the loss of the provincial household grant, many of our members are learning through trial and experience, that fundraising may be successful financially, and acceptable to the community. Fundraising is slow and painstaking. To make money through fundraising a library must be prepared to invest money in planning, expertise, marketing and training.

Other libraries are developing creative partnerships with school boards, the corporate sector, and agencies and departments of the federal and provincial governments. These partnerships reduce duplication, cut costs and in some instances generate revenue.

Fees, fundraising and partnerships are all potential strategies for reinventing library service. Library boards need the flexibility to use any or all of these strategies in whatever combination are of advantage to the local library. Some libraries may choose to develop extensive fee schedules, others may have the

resources to fundraise successfully or develop partnerships that enable them to avoid fees. Still other libraries may determine there is an acceptable mix of fees and fundraising, and finally some may determine such a mixture of strategies is counter productive.

CELPLO believes that in the context of public service evolution and reinvention, in a knowledge-based society, and acknowledging that the definition of library collections as items owned on the premises or items accessed electronically is fast blurring, it is undesirable to restrict the efforts of boards to diversify their funding.

It is recommended that draft regulation 26/96 under the Municipal Act be withdrawn and that library boards not be restricted in setting charges and fundraising.

CONFIDENTIALITY OF RECORDS

Repeal of Section 28 of the 1984 Act, Inspection of Records is a matter of concern to the library community.

A member library has secured a legal opinion which agrees that sub-section 28, (1) (v) protecting individual library records from disclosure is not necessarily covered in other provincial freedom of information legislation. This is a long fought for and hard won provision of the

1984 Act. The confidentiality of library borrowing records is an important ethical and practical issue to boards, librarians and library clients. It is *dismaying* to lose this provision in the general haste to eliminate Part I of the Public Libraries Act.

It is recommended that Section 28 of the Public Libraries Act, 1984 inspection of records and confidentiality, be retained in Bill 109.

SUMMARY OF RECOMMENDATIONS

- that Bill 109 be amended to establish the minimum size of a board, and consistent with the Corporations Act and requiring the presence of citizen representation.
- that Section 30 of the Public Libraries Act be retained providing for grants to public library boards and that the provincial per household grant continue to be made.
- that draft regulation 26/96 under the Municipal Act be withdrawn and that library boards not be restricted in setting charges and fundraising.
- that Section 28 of the Public Libraries Act, 1984 inspection of records and confidentiality, be retained in Bill 109. ♦

The Government's Response

In answer to a query from Ex Libris News, the office of Libraries Planning and Operations, Ministry of Citizenship, Culture and Recreation, has sent us a three-page handout entitled "Key Questions & Answers on Municipal Responsibilities." Here is a summary:

STATUS OF THE LEGISLATION

Bill 109 has passed Second Reading and Committee Hearings have taken place. The date for Third Reading has not yet been scheduled.

** If passed later this year, it would be in force when the municipal councils elected in the fall of 1997 take office. An amendment to the legislation ensures that only councils elected in 1997 or thereafter would have the powers proposed in Bill 109.*

LIBRARY GOVERNANCE

Public library boards would continue to be statutory corporations under the Public Libraries Act and would be responsible for library operations. They would continue to be appointed by and accountable to municipal councils. If a municipality has already established a library and a public library board, it will not have to pass a bylaw to establish them again, as the Bill provides for the continuation of libraries and boards already established by the present municipality. As was the case with any previous municipal election, the board members' terms would continue until they have been replaced.

Certain matters pertaining to boards which are currently prescribed in the

Public Libraries Act would be dealt with through a municipal bylaw. Before they appoint new board members, municipalities with public libraries would be required to pass a bylaw to establish the size and composition of the board (minimum three members); members' qualifications; the rules regarding reappointment; the procedures for filling board vacancies; the circumstances under which a board member's seat becomes vacant or a member becomes disqualified; when and how the first meeting of a board in a new term is to be called; and the rules regarding the reimbursement, if any of board members for travelling and other expenses incurred in carrying out their duties.

The timing for making board appointments -- at the first meeting of

council in each term -- would not change. If the council failed to do this at the first meeting, it would do so at its next regular meeting, and the existing board would continue until then.

Library board members would hold office for a term concurrent with their appointing council or councils, or until a successor is appointed.

Bill 109 would not change the way in which upper tier libraries are established. [Upper tier libraries represent larger jurisdictions such as regional municipalities.] Resolutions of at least two-thirds of the municipalities forming part of a county, regional or district municipality would be required to establish an upper tier library. Municipalities which do not wish to take part in the upper tier library system would not have to do so.

FUNDING

Public library operating grants are part of the "Who Does What" funding equation. Although they have been paid directly to the library boards, they are a municipal transfer. Responsibility for the library funding currently paid by the provincial government through per household grants is being transferred to municipalities as part of the "Who Does What" funding equation.

Bill 109 would not change the library board's accountability to council. Both Bill 109 and the current Public Libraries Act give Council full line-by-line approval of the library's budget. Both also require a library board to submit an annual audited financial statement to council. The library estimates or budget process would, the government reports, be "essentially unchanged." Library boards submit estimates to their appointing council or councils annually. The estimates are submitted in the form required by the council and must include all amounts required during the year for the purpose of the board. If there is more than one appointing council the estimates are required to include a statement on the proportion of the estimates to be charged to each of the municipalities. Council may, in the approval of the board's estimates or at any time at the board's request, authorize the board to apply a specified amount or percentage of the money paid to it otherwise than in accordance with the estimates as approved.

FEES FOR LIBRARY SERVICE

Under the Municipal Act, a library board would not be able to charge for admission to the library, use of its collections by the public, borrowing of books and other printed materials, or borrowing from a public library by or for residents with a disability of material specially formatted for persons with that disability.

The proposed Municipal Act on library user fees would take effect at the same time as Bill 109, if passed, when the new municipal councils elected in the fall of 1997 take office. At that time libraries could choose to charge user fees for borrowing video tapes or compact disks, for example.

Although one person in the Libraries Planning and Operations Office anticipated that this should occur "within the next few weeks" (after 25 August), another spokesperson refused to commit herself on this timing. The Office also wished to make it clear that in the past, libraries could not charge patrons who wished to borrow non-print materials such as compact discs, videotapes or videodiscs. The new legislation would give them the freedom to charge for non-print materials, if they wish, but they are not obliged to do so. They may also elect to charge for certain services, e.g., extended reference searches. However, no decision has been taken on charging for online searches. ws| ♦

A Letter to Our Readers

Why we join Ex Libris

As the current Chair of the Membership Committee, I have been thinking about my reasons for joining Ex Libris Association. Initially, it was because a friend gave me an application form and told me that she thought I would enjoy being a member. Since then I have continued my membership because I have appreciated the opportunities to keep up my contacts with colleagues through Ex Libris News and at the annual get-togethers. The speakers, articles and news notes are interesting. Keeping in touch with our colleagues is fun!

I am convinced that people join Ex Libris because someone tells them about the Association and asks them to join. I suggest that each member invite a friend to join Ex Libris. For your convenience an application form for a friend is enclosed with this issue of the News. ♦

Margaret E. Cockshutt
ELA Membership Committee

Amalgamation Waves

by Judith Hare
Chief Executive Officer
Halifax Regional Library

Amalgamation is like the ocean. When the water looks calm and you turn your back, a big breaker comes along to knock you under.

Amalgamation waves started rolling with the release of the Hayword Report of the Municipal Reform Commissioner in July 1993. This report determined that unitary government would be most appropriate for the Halifax metropolitan area, providing administrative efficiency within a larger service unit. Expenditure reductions of \$11,000,000 initially and \$9.8 million per year thereafter were predicted if consolidation occurred. Amalgamation of public libraries received little attention at the time. The Hayword Report noted that present cost-sharing arrangements between the Province and the municipal units were not expected to change. The Halifax Regional Municipality Act came into effect on April 1, 1996, amalgamating the City of Halifax, City of Dartmouth, Halifax County and the Town of Bedford.

Public library administrators wasted no time in fighting the inevitable. A Joint Advisory Committee of CEOs and Board chairs was established prior to passage of the Act to manage amalgamation. The libraries had a long history of cooperation, shared a common service mission and could envision service delivery advantages. They were determined to seize the opportunity and work step-by-step through each issue. For this reason, library amalgamation is widely regarded as the most successful amalgamation achieved with minimal conflict and without disruption to public service.

Impact of the first waves was on personnel and technical services divisions. There was an immediate need to reorganize, merge operations, move locations, determine policies and establish salary and benefits compensation. A workplace adjustment program provided early retirement and several packages for redundant position incumbents. There were, and

continue to be, three salary scales, benefit packages and pension plans. Two of the former units were non-union; one was unionized. As a result of employee voting, the Dartmouth union was decertified and a staff association was formed. In Technical Services, merger resulted in the creation of one database, policies, procedures and practices, and the automation of previously manual systems.

With one year behind us, the next waves are hitting public service divisions. Most challenging is the difficulty of melding three very different cultures into one and standardizing terms and conditions of employment. From a public service perspective, however, library amalgamation has been a great success. OPAC access to a wider collection, delivery systems, building improvements, strengthened support services, new technology and staff development programs have all contributed to higher quality service.

Transition costs were badly underestimated. At the end of fiscal year 1996/97

the amalgamation deficit totalled \$26 million, made up of deficits from the former units, blended sales tax increases, transition costs, provincial grant reductions and provincial reluctance to pick up social service costs. A protracted 1997/98 budget process resulted in a \$705,810 cut in municipal funding and \$103,810 cut in provincial funding to the Halifax Regional Library. This triggered service reductions and layoffs to balance the budget. Most significantly, budget woes have set back the Board's plans to achieve service equity within the rural areas. Looming on the horizon is the lifting of a provincial wage freeze in November 1997.

Mixed in with the pain of amalgamation, there is pleasure. Halifax Regional Municipal Council has approved construction of a new central library to open in 1999.

The water is still very rough, but we are optimistic that the benefits of amalgamation will be realized -- eventually! ♦

THIS JUST IN... from *InsideOLA* No. 35

Commission hears OLA but...

Teacher-librarians left out on a limb

The Education Improvement Commission's Report, *The Road Ahead*, released this week, retreats from the original position that library technicians were a viable alternative for staffing in Ontario's school libraries, in favour of a team approach that would include certified teacher-librarians and library technicians.

There are three recommendations that have the potential to modify how school library programs are delivered. These include encouragement of a team approach to staffing, modification of the Education Act to allow non-certificated individuals to supervise students and to deliver "certain programmes", and encouragement of greater co-operation between school boards, community agencies and private sector companies.

In the July meeting with OLA, the Commission's emphasis was on library technicians as a replacement for teacher-librarians. *Partners in Action* was challenged as a program misunderstood by

many teacher-librarians and one not proving adequate to the needs of students and teachers in too many schools.

In the most extensive reference to teacher-librarians, *The Road Ahead* presents disparity across the province as an obstacle to drawing conclusions, and as such few are actually drawn.

"For example, for many schools, a study of the use of library technicians would be an assessment of adding trained staff to a facility which is currently understaffed. In other cases, it would be a comparison to the use of teacher-librarians and in still others the change would be the addition of library technicians to the delivery team. It would be difficult to do a valid comparison based on such varying starting points and types of intervention."

In order to remove the requirement of educational qualifications for others, the Minister will be opening the section of the Act requiring qualifications for librarians. Then what?

Libraries and Electronic Publishing

by Jane Horrocks
CEO, Richmond Public Library

At Ex Libris Association's annual meeting in November 1996, participants asked the guest panel questions concerning the future of libraries. Because of time constraints, not all of the questions could be answered at the meeting. Here is the reply Jane Horrocks sent us to the question: Are new graduate librarians prepared through course work to deal effectively with electronic material types in the public library?

In addressing this question, three types of digital publishing will be examined and the relative importance, or lack of importance, of electronic/digital materials in today's marketplace. After some of the services and skills needed in the public library are identified, the curriculum of the library schools will be addressed.

Publishers of periodicals have produced and distributed their titles electronically for years. Academic libraries and more recently public libraries have made electronic periodical titles available on Local Area Networks, stand-alone CD-ROM workstations and via on-line access to commercial databases. In many cases, librarians specializing in access to these materials have been the norm when the materials are first introduced with a gradual shift to generalist reference librarians assisting with these searches. This form of distribution is now well established.

The conversion of the monograph is the second area of digitization on the part of the publishers. "While electronic information access is unlikely to replace the book collection in the near future (or ever), some categories of information and knowledge will become totally digital. Data (statistics, lists, stock market quotations, anything that is immediate, changing, hard to keep up in print and distinct) will go electronic." (1) The most likely materials then to change format are reference materials and this shift has already begun. "Electronic and mul-

timedia materials have made serious inroads in reference materials - replacing encyclopaedias, atlases, writing tools and almanacs." (2) The extent to which the shift is occurring can be gauged from a recent discussion with a representative from the largest publishing conglomerate of reference tools who foresees that 50% of revenues will be derived from electronic reference titles within three years. The shift to digital is well underway and is starting to have an impact on the delivery of service in reference departments of public libraries all over the country.

Of the 7,500 reference titles at the Richmond Hill Central Library, for example, 30% are currently available from publishers in electronic formats. Richmond Hill has the right to use or has purchased 25 digital titles.

Given the proliferation of digital information in reference materials and the demand exhibited by the public for access to this material, the expectation is that general reference librarians will make these items available along with information from print formats.

Not only are publishers distributing their materials digitally, libraries are beginning to transform information they own from print to digital files, marking up the information with Hypertext, Mark-up Language (HTML) or Standard General Mark-up Language (SGML). The types of materials most often chosen for this treatment are local history scrap-book materials, photographs, maps and other items where the library created the intellectual property or has copyright clearance. In the same way that cataloguers have always been specialists in the field, their new counterparts will mark-up original materials and organize methods of retrieval for other published digital materials.

Have the library schools recognized the shift in publishing and self-publishing and how have they adapted to these changes? Both Western's MLIS program and U of T's FIS are producing new librarians with skill sets ready to meet the challenge. Both schools have core

courses that address electronic formats in document management and information resource courses. HTML and SGML are taught in both schools with electives providing a more in-depth approach. Courses on representing, organizing and storing information are also offered and deal with the creation of information and the dissemination via tools such as Web sites. Students are given the opportunity to create their own Web site as part of the programme. As all of these skills are currently in demand in public libraries, new graduates are well positioned to take their place in today's library.

The biggest challenge for library administrators will be the retooling of the skill-sets of existing employees, many of whom have resisted, and still resist, change. The new graduates will lead the way. ♦

- (1) Mason, Marilyn Gell. "The Future Revisited," *Library Journal* (July 1996), p. 71.
- (2) Carmona, Jeff. "CD-Based Reference Tools Serve as Virtual Libraries." *The Journal* (August 1, 1996).

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Public Library Service in Newfoundland

by Pearce Penney

Five hundred years ago Giovanni Caboto - a.k.a. John Cabot - came to our shores, and, according to history, landed at Bonavista. The celebration of that event is in full swing even as I write this article.

Four hundred and thirty-eight years later, on January 22, 1935, our Government of the day saw fit to pass a Public Libraries Act. This makes our service one of the youngest in the country in terms of a formalized and legislated act. The first public library was in St. John's, and it remained the only service for many years before it extended into some of the larger towns. The very first library board was made up of representatives from the commercial, professional and industrial life of the city. The list reads like a "Who's Who" of St. John's. Anybody who was anyone served on the first library board.

However, from the beginning the overall plan was to extend library services to the "largest outports as opportunity offers." This was slow in coming, primarily because money was hard to come by - an all-too-familiar reason. During those days of the Great Depression, especially, it was hard enough to provide food for the body, much less for the mind.

The collection for the first free public library was donated by a Mrs. W.G. Gosling from her late husband's private library. That formed the nucleus of the first library collection in St. John's. W.G. Gosling had been the first mayor of St. John's, and the first library was called the "Gosling Library" in his honour. His name remains synonymous with public library service in Newfoundland to this day.

1949 was the turning-point in public library service in Newfoundland. Prior to Newfoundland's joining Canada (or was it the other way around?), there were twenty-five libraries outside the city of St. John's. In 1952 a five-year plan was

unveiled which called for the establishment of a regional library service. However, nothing really happened until 1970. It called for eight regions, subsequently reduced to six. The first region to come on stream was the Western region with headquarters at Corner Brook. It took fifteen years before all six regions were in place, the last being Labrador-Northern Region, in 1985.

From the outset public library services received its funding from the provincial government. There was no requirement for the municipalities to provide either funds or support, although many have done so on a limited scale. Therefore the service has always remained a provincial one.

Another impetus to library development was the Great Centennial Celebration in 1967, when the federal government made important additions to the province's collections of Canadian publications. Municipalities discovered that, by including space for a library in their proposal to build a town hall, they would be sure to get a federal grant. This was a bonanza for the library system, but it came with a price. Dozens of towns were building town halls and including space for a library, but there was one flaw: they forgot to consult with the Provincial Public Libraries Board. All of a sudden the Board was entrusted with instant libraries without any additional funds to operate them.

In the early 70s bookmobiles were introduced into the system. At the time they met with great favour, introducing many people to public library services. However, as the regional systems developed and more libraries were established, the bookmobiles were put out to pasture, and the service initiated books-by-mail, a delivery system patterned on the Sears and Eaton's order services (without the glossy catalogues). The service was introduced in the Central region, where it was very successful, then applied at the provincial level. Alas, it got too big for us, and had to be

scaled down considerably, thus losing much of its effectiveness.

The aim of the Provincial Public Libraries Board has always been to provide a library service to as many people as possible. During my 21 years with the Provincial Library System, finances dictated just how far and how fast we could go. But we could never have accomplished what we did without the determination and dedication of local library boards and their staff, who worked well beyond the time allocated and thought nothing of it. There are many memorable experiences that could illustrate this.

In one of our small communities, for example, the library was in a lady's home. She gave up part of her living room, with a separate entrance and a divider in the room. She lived alone, and the library was her life. The library was only open about ten hours a week, not nearly enough to satisfy the needs of students. She referred to these students as "hers." There was a standing offer to any and all students that, should they need extra time to research their projects, she would open the library and they could come to work there during the evening. She continued this practice for many years. The fire crackled in the living room stove as students roamed in and out doing their research. She did this without the slightest thought of extra remuneration.

Another community wanted to have a library, but had no building. It was during the 70s when the federal government was giving grants for Federal Initiative Projects. The community's school principal, Sister Patricia King, called a public meeting and told the townspeople what she had in mind. Then she proceeded to organize the men to go into the woods and cut logs, take them to the nearest sawmill and have them sawed into lumber. The women were asked to start a fund-raising drive to purchase needed materials. Less than a year later we were invited to attend

the official opening of their new library.

The many changes that occurred during my tenure with the Provincial Public Libraries Board brought with them many challenges. Perhaps the biggest challenge was change itself, which was constant and is still going on. The Board has had to downsize and restructure. It has reduced the number of regions from six to three, and consolidated some of the smaller libraries.

Others have been merged with schools and community colleges. There is a concerted effort to tie into the latest technological network, linking the regional offices with the provincial and local libraries with their regional headquarters. As well, they are positioning themselves to hook into the Internet and other information systems.

Thus, our young (62-year-old) library system is reaching out to its clientele through the Information Highway, while at the same time providing those of us who are still in awe of the computer with recreational reading.

For 21 years it was my privilege to work with staff and library boards to provide as many people as possible in the province with a public library service. It's a great system, and I am pleased to have been associated with it.



Pearce Penney is the former Provincial Librarian of Newfoundland.

Also Noted

Ronald F. Yeo Bursary

August 30 was the date of the last call to apply for this bursary which provided money for studies in management for librarians. The bursary is to be collapsed because low interest rates have not produced enough revenue for its continuation.

As We Were

The Evolution of a Special Library: The Imperial Oil Library, 1945 - 1957

by Clara Miller

Toronto 1945. After six years of war, signs were appearing that there might be a cessation of fighting on the European front and, eventually, peace in the Far East as well. Wartime rationing had meant that the products of an oil company were almost entirely assigned to the war effort. With the coming of peace, the needs of a civilian population would now have to be addressed.

This was the situation when I went for an interview at Imperial Oil Limited one wintry day in February 1945. The company's newly formed Public Relations Department was getting organized for a postwar economy; a library was one facility it wished to establish. I was lucky; the position was offered to me. As I was on staff at the University of Toronto, it was agreed that I would start full time at the end of the University year.

Come July 1945 there I was, the first professionally trained librarian to be on staff, and in a new department of about eight or ten people, all housed in a small office of about 800 square feet. It was a case of fit in where you could. There was scarcely room for a desk for each person.

The first thing to do, of course, was to get information on the company and the industry, and to discover what, if any, material was available that would be useful for the library. Already newspapers from across Canada were received and checked daily, and a one-page summary of significant items was delivered at the start of each day to the desks of company members concerned with planning, policy-making, and day-to-day operations. There were a few books in the department, such as *Canada Year Book*, *Canadian Almanac*,

and *Canadian Parliamentary Guide*. There was also a set of *Imperial Oil Review*, the company publication, which provided very useful background on the company.

At this time the head office was spread throughout various buildings. Scattered departments and lack of space did not augur well for a company library. However, plans were in the air for a building to house the executive office under one roof, improving the prospect for a central company library. With this in mind, a survey of the holdings of books and journals in each department was considered advisable, not only to show what was available, but to provide a profile of the interests and activities of each department. Such were our plans, but - and it was a big BUT - these plans would not come to pass for many years.

In Western Canada Imperial Oil had been exploring and drilling for many years. Until 1947, all there was to show for these efforts was an accumulation of 133 dry holes. But on February 13, 1947, Leduc No. 1 was brought in, a day that made history for the Canadian oil industry. With this discovery, every effort and practically every penny was directed towards financing and developing the oil industry in Western Canada. Needless to say, plans for an executive office building in Toronto were put on hold. But that was all that was put on hold! I wish I could give you an idea of the excitement and exhilaration felt throughout the company - and the country - with this discovery of oil in the west. It aroused great public interest in the Canadian petroleum industry. We were inundated with requests for publications and information on all aspects of the industry from newspapers, magazines and schools. Clubs and groups asked for speakers on the subject. As