ABSTRACT
The paper covers the history and evolution of an annual voluntary effort covering all major public libraries in Canada, emphasising what is distinctive about it today including content and process. It describes in detail the process involved which requires only 100 hours over 2 months to collect and distribute the extensive results. The paper discusses the value of this effort to the public library community in general and to specific regions and systems in particular. A sample of the current survey instrument will be presented and reviewed briefly noting the distinctive elements of the Canadian model. The numerous reports generated annually for participants in the survey will be described and evaluated as well.

The paper covers recent approaches to redefining performance measures for this national group including the place for ISO definitions. It identifies the efforts being made to develop a national benchmarking tool in key areas of national concern and a process and template for local balanced scorecard data as well.

The paper concludes by identifying current statistical needs in the Canadian public library community and proposing solutions for the future, including the emphasis on a set of national key performance indicators for public libraries, sound benchmarking practices, and the evolution of a “balanced scorecard” approach to gathering and sharing data nationally in Canada.

Public libraries in Canada are a success story. Over the decades since the end of the war they have handled great expansion, reinvention, computerization, and digitization with tremendously successful results. They benefited greatly from the country’s centennial celebrations in 1967 when vast funds were spent on infrastructure across the country. The philanthropy of the Gates Foundation in the 1990’s further improved many. As a result, today the public library service for 35 million Canadians is among the best anywhere and is well used and well regarded.

In Canada public libraries are the responsibility of the 10 provincial governments and the three territorial areas. Every province has established legislation through a public libraries act that allows for the local government to establish and maintain a public library under certain conditions and in accordance with certain requirements. Cities, towns, villages, regions, counties, or districts – or combinations of these – then by local bylaw create and operate their public library service. This is all permissive not mandatory legislation, unlike schools. Despite this almost every corner of the vast country – from major metropolis to tiny rural area – offers state-of-the-art public library service today.

Public libraries in Canada although created by the senior level of government are then the funding responsibility of the local level. They are mainly funded
through local property taxes, although every province does contributes a small annual grant as well, and typically from time to time some additional project funding. Some local governments also create development levies to collect funds from developers when there is growth to fund the one time costs of the establishment of the service to the new residents. Ironically it is the senior level of government that determines and defines what may and may not be charged for by the local public library. Nowhere are there strict minimum or provincial standards of service although there may be guidelines.

Every province offers some support function for the public libraries of that province. Typically the services of the provincial office focus on the plethora of small (to smaller!) rural and remote libraries that can be found in every province. In addition every province has a grants office that administers the act and the annual grant, and which also collects and distributes annual mandatory statistics from the public libraries of that province. These annual statistical reports have been notoriously tardy in being produced and, although exhaustive and standardized for the province, are not useful in making national or cross-jurisdictional comparisons or conclusions.

As public libraries vary so greatly across the country there is a need to find and use comparable libraries in looking at performance indicators. This will require looking out side the province in many cases, especially for large urban centres of which there are few in the country. The Canadian Urban Libraries Council (CULC) is a national organization of public libraries serving urban populations over 100,000 and it has 30 members. Not all provinces are represented in this group of “large urban public libraries.”

CULC has traditionally collected annual statistical data from its members and in recent years from another 30 smaller public libraries in order to produce an annual national statistical report on public libraries. This data set offers at least the statistical result of standardized elements and definitions and in an extensive number of performance areas. The resulting annual statistical report has been greatly respected and appreciated by the national public library community and other related business sectors. CULC’s leadership in undertaking this annual survey and data reporting has been held as an example to other library sectors and agencies in the country and beyond.

The Canadian Urban Libraries Council or CULC was until recently the Council of Administrators of Large Urban Public Libraries or CALUPL, and was formed over 30 years ago as a voluntary association to bring public library directors of the country’s largest and more influential public libraries together to address common and national policies and to develop national positions on public library issues. As a small group across a large country it worked to connect the major urban centres over a period of rapid and expansive growth. The members were the “movers and shakers” of the day. Over the years the group has grown from a dozen to almost four dozen members and it is still growing annually as urban centres continue to explode in all provinces.
Today CULC’s annual survey instrument represents an effort to capture the essence of public library service in the 100 largest public libraries of the country. However, despite being invited to participate in the annual effort only about 70 public libraries actually do each year. Nonetheless the population reported on is over 17 million and represents about 50 percent of the country. So CULC’s standardized data elements and reports provide a fair portrait of the public library service of the country.

The basic elements of the annual national CULC survey are the traditional ones – active users, locations, total space, visits, total hours, circulation, programs and attendance, interlibrary loans out and in, financial information in detail, staffing numbers in detail, and also extensive contact information for the benefit of others. In addition to these usual data elements the CULC survey has historically concentrated on collections as part of a commitment to the book publishing and production sectors in the country. Cultural issues loom large in Canada as it tries continuously to preserve and reflect its own culture in the shadow of the American reality so close by. This is particularly important to the country in its publishing and writing industries.

As a result of this cultural commitment the CULC survey contains some unique collection data: items added, items held, titles and copies, subscriptions and copies … As well the survey collects annual data on the spending habits of reporting libraries. This information includes amount spent on books, amount spend on periodicals, amount spent on non-print, and amount spent on electronics. It then goes on to report on the amount spent with Canadian publishers, with Canadian wholesalers, with American suppliers and with off shore suppliers. It also reports on the annual amount spent on mass market paperbacks and children’s materials by request of the publishing community.

The figures from these last elements have guided a lot of actions and activities of the Canadian book industry over the years. As a result today through collaborative initiatives and mutual interests, the presence of Canadian publishing and production has increased in public libraries and the awareness of public libraries has improved in the book sector. Collective efforts have resulted in the rise of a strong national wholesaling sector and improved marketing and promotion of Canadian books products to and through Canadian public libraries. This relationship is not an easy one and requires constant vigilance and communication but the original intent of creating a stronger print culture has been achieved with effort and the numbers.

As well the annual CULC survey has lately focused on electronic activities of reporting libraries and also issues affecting the national community. The survey presently attempts to collect figure on the number of Internet workstations, the number of e-visits, the number of databases provide to the public, and the number of uses of those databases both in-house and through remote access. Although the creation of new reporting elements is an ongoing activity of the group the ability of all libraries to report on these is frustratingly low today, although CULC is not the only group experiencing this difficulty as the community continues to search.
for meaningful, obtainable standardized measures of electronic activity in most libraries.

With the annual statistical survey report CULC has also historically provided a series of ranking tables and quartile analyses on major performance measures to assist in the use of the statistics. These have allowed the group to identify medians, ranges, and relative standings of like libraries in key areas of activity. Reviewing these over the years has also allowed for a snapshot of changes across the sector over time. A good example would be the shift in total annual expenditure on materials and specifically the allocation of funds to print, non-print and electronic resources over time. Such information was of particular value to publishers and producers of library materials. Of course the typical measures – loans per capita, membership, expenditures per capita – also get the usual attention by the group.

In recent years CULC has expanded its annual survey of system level data to include branch level data. This has produced an annual report on key performance elements of over 300 branch libraries from over 25 public library systems across the country. These results have allowed a system to find comparable branch libraries in other systems and to make comparisons and draw conclusions from this analysis. Such information is not collected by the provincial surveys or easily obtained if desired. It has also allowed a national picture to be created of service at different levels of branch size and activity. The survey itself is short and simple asking only for 6 key branch level indicators: size, staff, hours, circulation, programs, and questions. From these numerous performance indicators are produced for comparisons and conclusions.

The distinction of the annual national CULC survey is that it is created, maintained and conducted on a voluntary basis by its members. One large library system voluntarily coordinates the annual effort and the work between surveys. The national library in Canada has not seen a role in coordinating or funding this activity to date. Although each province does produce its own annual statistical report these are not as helpful in planning due to their limited primary reporting function and lateness.

Increasingly in Canada local governments who fund public libraries are expecting that sound business data be part of planning and budgeting. In most cases cross-province comparisons are expected. For example, the public libraries in Canada serving more than 500,000 are fewer than 10 and they are spread across 5 provinces. National standardized data is increasingly required by those planning for and defending excellence in public library service.

As demands on performance measurement change and increase CULC continues to look at its annual survey to produce useful results. In recent years the members have agreed to share areas of current activity or expertise for the benefit of others. This simple additional open question has allowed respondents to pursue areas of need or interest with others. Respondents have also shared the details of their salaries and benefits in detail as well as details of their integrated library systems and contracts.
CULC has for years collected data via a questionnaire and then input the data centrally allowing for coordination and editing. In recent years the survey has provided last year’s response and space for this year’s numbers in an Excel spreadsheet format. For the last few years a web-based pass-worded real-time survey tool has been utilized. In addition to reducing the time involved from over 300 hours to well under 100 hours, it has improved accuracy and completeness, resulting in a quicker report. As well it has also allowed for notes and comments to be collected and shared with the report.

Gaps and deficiencies of this annual effort have been acknowledged over the years. These include: no year over year changes, no trend analysis, no easy access to historical data, no graphical reports, no French language components, no easy comparison to other data, no relation to socio-demographic data…

Starting with the 2008 statistics report all these issue will be addressed as the group is negotiating with a third party service provider whose product will make all these developments possible – and more. As well, the branch level data will be expanded and included in the survey making participation easier for respondents.

Canada’s public libraries have enjoyed access to comprehensive, standardized, annual statistics in a timely and useful format freely for over 25 years. Many libraries have cited the availability of such data as pivotal to their local success in advocating for improved funding and services. This in turn has resulted in raising the national average in key areas such as space provision, collections, hours of service, staffing levels, and more recently in the provision of new technologies.

Today Canadians enjoy an impressive level of public library service from coast to coast to coast. The annual national statistics efforts of the Canadian Urban Libraries Council over many decades have played and continue to play a pivotal role in serving the disparate needs of the public libraries of this country. In Canada because public libraries count, public libraries count.