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## Leading Change and Restructuring the Manitoba Library Association

## Diriger le changement et restructurer la Manitoba Library Association

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### Résumé de l'article

Les associations provinciales et régionales de bibliothèques fournissent l'infrastructure nécessaire à une défense efficace des intérêts, à l'apprentissage, le développement et le réseautage professionnels, et aident à faire avancer les bibliothèques. Cet article met en lumière la restructuration de la Manitoba Library Association, un projet lancé pour maximiser l'efficacité et l'efficience de l'organisation.

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## Leading Change and Restructuring the Manitoba Library Association

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### **Abstract**

Provincial and regional library associations provide the infrastructure for effective library advocacy, professional learning, development and networking, and help to lead libraries forward. This article highlights the re-structuring of the Manitoba Library Association, a project initiated to maximize the effectiveness and efficiency of the organization.

### **Keywords**

Library associations; professional associations; amalgamation; merger; Manitoba

This paper will discuss a pivotal three-year period of a provincial library association in the prairie province of Manitoba, Canada. The author served as Manitoba Library Association (MLA) President from December 2015 to June 2018 and as Chair of the Manitoba Libraries Working Group from January 2016 to January 2018. The Working Group was established to explore the consolidation of various Manitoba library associations in order to gain stronger strategic positioning with members, funders, and policy makers and to increase organizational stability. During this period, MLA evolved and restructured itself to include both a Trustees' and a Technicians' division. These changes not only tripled MLA's membership size and capacity, but also diversified the association in order to increase community impact while better serving libraries, library workers, and library supporters in Manitoba.

By describing the Working Group's purpose, timeline and proceedings, this article shows the process, decisions, and actions involved in effectively consolidating library associations. Leading this type of change is not easy. It requires significant time and dedication; it requires effort and ability to build and nurture a collaborative team of

stakeholders who may hold very different points of view; it requires thoughtful leadership, self-awareness, humility, and drive. The selected resources listed at the end of the article provide a starting point for learning about several facets in which a change leader and team must be knowledgeable in order to be effective. While some of the resources, like those by La Piana (2008a, 2008b) and Tamarack Institute (2017), were used throughout the process, others, like Kotter's (2018) eight-step model for change, which is highly applicable to this type of restructuring, were discovered later on. An amalgamation of organizations requires a fine balance between knowledge of legal implications, governance principles, policy, and by-law and the interpersonal skills required to negotiate, debate, and build consensus. For the purposes of this paper, the terms "amalgamate," "merge," and "consolidate" are used interchangeably.

## ***The Question***

The Manitoba Library Association celebrated its 80<sup>th</sup> anniversary during the 2016 Manitoba Libraries Conference. At this conference, MLA was in the midst of major discussions with numerous other Manitoba library association leaders about a possible amalgamation. The associations included: the Manitoba Library Trustees' Association (MLTA), Manitoba Association of Library Technicians (MALT), Manitoba School Library Association (MSLA), Manitoba Libraries Consortium Inc. (MLCI), and the Manitoba Association of Health Information Providers (MAHIP), which is a chapter of the Canadian Health Libraries Association (CHLA-ABSC).

The fundamental question was whether or not it was possible to create one stronger and more viable multi-sector library association for the province. Reducing the number of organizations operating as standalones and amalgamating into one larger entity was an opportunity to develop MLA in order to increase its value and impact both provincially and nationally. The most important desired outcomes included an association that would:

- 1) Create a stronger and unified voice to more effectively carry out its advocacy work
- 2) Increase its membership and expand its volunteer-resource base
- 3) Realize economies of scale and maximize its potential
- 4) Be better positioned to participate and contribute nationally

## ***The Role of the Provincial Library Association***

Embarking upon a restructuring or reorganization presents an opportunity to take stock and unpack many aspects of an organization. Leaders can invest time in learning about the organization and similar organizations. This process can involve talking to leaders of other provincial library associations, asking them questions, and learning from them. The purpose of a library association is to help lead local libraries forward by supporting its members in their efforts to advocate, connect, learn, and develop. An association

works to promote awareness and demonstrate the value and impact of libraries to the community at large. Library associations advocate for better library services and access by:

- 1) Identifying and addressing key trends, needs, and issues
- 2) Meeting with elected officials and decision-makers
- 3) Writing letters and position statements
- 4) Initiating campaigns and events
- 5) Organizing professional development opportunities and a regular conference
- 6) Maintaining and growing scholarships, grants, and award funds
- 7) Facilitating committee work and commissioning studies
- 8) Communicating to and with members effectively

### ***The Manitoba Libraries Working Group 2010-2018***

The Manitoba Libraries Working Group was initiated in 2010. It began with representatives from all of the aforementioned stakeholder organizations, in addition to representatives from the Canadian Association of Special Libraries and Information Services, Manitoba Chapter (CASLIS), and the Special Library Association, Western Chapter. The Working Group was tasked with examining the current library association landscape in Manitoba and conducting a national environmental scan of other provincial and regional library associations. It sought to determine what support, if any, existed in the library community for the development of a new model for Manitoba. In 2010, the Working Group conducted a survey that was distributed to all library workers and libraries in Manitoba. The survey was designed to determine the perceived strengths and weaknesses of Manitoba's multiple library associations and what services and functions were most important to members. Over 400 responses were received, and members of the Working Group summarized the results at a session held during the 2012 Manitoba Libraries Conference. The survey concluded that there was an interest within the community to see a stronger, more viable MLA that would maximize resources in order to better serve the community as a whole. After the 2012 presentation, the Working Group disbanded and the discussions about merging came to a standstill.

In May 2015, while restructuring and dissolution discussions were proceeding nationally at the Canadian Library Association (CLA), various stakeholders and representatives in Manitoba reignited the Working Group discussions about merging the multiple library associations. Declining membership, volunteer fatigue, general financial constraints in the library sector, and many other factors were affecting the associations' focus and weakening their positions. A springtime meeting of stakeholders was optimistic, and the revival of the Working Group with new representatives began in June 2015.

The Working Group began meeting frequently and sought legal counsel. The Working Group asked itself, its boards, and the community the following questions:

- 1) Are we working in competition with ourselves?
- 2) Are we diluting funding potential?
- 3) Are we confusing decision-makers?
- 4) Are we duplicating resources?

Affirmative answers to these questions were the catalyst for change. Meeting by meeting, the Working Group created a plan to merge associations into MLA.

### ***Not-for-Profit Mergers***

The Working Group studied best practices for not-for-profits undergoing strategic restructuring. It was noted that few non-profits were destined to thrive in perpetuity. Vergara-Lobo, Masaoka and Smith (2005) outlined a number of potential benefits of mergers and provided guidance for Boards of Directors who may be considering a major restructuring. They noted that few non-profits are “destined to thrive for centuries.” Vergara-Lobo et al. (2005) and La Piana (1998) described the following expected outcomes for restructuring:

- 1) Better position the non-profit to advance their mission
- 2) Reduce total administrative costs (however, most community-based non-profits have underdeveloped infrastructures and a merger may often result in a rise in administrative costs)
- 3) Bring attention to and strengthen underdeveloped internal structures to result in a stronger organization

Vergara-Lobo et al. (2005) validated the concept of an inter-organizational merging negotiations team instead of individual or separate committees. They also noted that proceedings may include:

- 1) Organizations getting to know each other
- 2) Meetings between Board Chairs and Executives examining potential benefits of merging
- 3) Reviewing projections about what consolidated items might look like and discussing obstacles
- 4) Compromise and negotiation
- 5) Talking openly and thinking creatively

- 6) Clear and consistent communication to ensure that decisions are implemented successfully and “stick”

The merging process therefore needs to be lengthy, as each board must seriously consider the recommendations and have ample opportunity and time to express concerns.

Vergara-Lobo et al. (2005) provided guidance on high level legal procedures that were applicable to MLA's proceedings. In the case of a technical merger, each organization would vote to dissolve its corporation and incorporate a new organization, whereas in a “dissolve and combine” model, one or more organizations would vote to dissolve their corporation and transfer their assets to another. The surviving organization—“the host”—would vote to accept the assets and elect new board members. For MLA, the “dissolve and combine” model was followed. The process of consolidating various Manitoba library associations in order to gain stronger strategic positioning with members, funders, and policy makers and to increase organizational stability was completed over the course of three years.

In 2016, the Working Group facilitated two town halls in May and September. Those present at the town halls included representatives or members from various library associations in Manitoba (both institutional and personal members), the Public Library Services Branch, and library workers and library trustees in Manitoba. These town halls were key events to host early in the process in order to gain buy-in, receive and discuss member feedback, and build consensus. The key messaging that was outlined at these town halls included:

- 1) the vision
- 2) the proposed new structure
- 3) an overview of all possible scenarios, including status quo and dissolution

Furthermore, developments at the national level—specifically the dissolution of the Canadian Library Association (CLA) on January 27, 2016 and the incorporation of the Canadian Federation of Library Associations / Fédération canadienne des associations de bibliothèques (CFLA-FCAB) on May 16, 2016—triggered the opportunity to re-examine the roles, work, and efficacy of existing library associations in Manitoba and how they engage at the national level.

In November 2016, the Working Group released its final report: *One Manitoba Library Association: Final proposal: Together we can achieve more* (Stefanko et al., 2016) This document highlighted the benefits of consolidation and proposed a new membership structure, organizational chart, and revenue model. The report detailed a reinvigorated MLA model that had the potential to significantly enhance effectiveness. The document argued that one strong and cohesive MLA would promote collective impact, facilitate clear and consistent communication, and synchronize a common agenda to inevitably strengthen and mutually reinforce MLA, MALT, MLTA, and MSLA's activities.

## ***Preparing to Merge***

MLA tended to several housekeeping items over the course of 2016 and 2017 in order to ensure a smooth transition and a clean and healthy “host”; this process included retiring some existing projects. At the December 2016 AGM, MLA passed a resolution agreeing in principle to reform and restructure the Association in order to constitute Divisions. The resolution stated that the Chair of each Division of the Association, or designate, would sit on the Board of Directors. In policy, a Division would represent a defined number of members in a specific sector of the Association. The legal responsibility for the affairs of the Association would rest with the Board of Directors. This resolution set the tone for 2017 as the Working Group embraced the direction from the MLA membership to proceed with overseeing and executing the amalgamation. Similar motions were brought forward to the MLTA and MALT AGMs.

## ***Two New Divisions: MLTA and MALT***

Over time, it became clear that MALT and MLTA would dissolve as standalone organizations and fold into MLA’s governing and operational structure. At MLA’s December 2017 AGM, the membership officially elected one trustee and one technician to its Board of Directors. This action solidified the new structure, because the new Board members were the Chair of MLTA and MALT respectively at the time of their election. Including representatives from MLTA and MALT on MLA’s governing Board of Directors ensured that funds and assets were transferred into MLA under the appropriate legal authority and direction. It also ensured that any decisions of the “new” MLA were voted on by both Divisions’ representatives. Similar programs and agenda items were integrated, and duplicated services such as websites and finances were combined. In 2018, the amalgamation was officially realized. The Manitoba Library Trustees’ Association (MLTA) and the Manitoba Association of Library Technicians (MALT) both dissolved as standalone organizations and transitioned their assets. A new MLA policy was drafted to define a new concept for the organization—a Division—and subsequently, both MLTA and MALT became Divisions of MLA. The policy ensures the Chair or designate of each Division a seat on the MLA Board of Directors.

## ***MSLA, MLCI, and MAHIP***

The Manitoba School Library Association (MSLA), Manitoba Libraries Consortium Inc. (MLCI), and Manitoba Association of Health Information Providers (MAHIP), which were integral to the Working Group discussions, remained standalone organizations. MSLA is a Special Area Educators Group (SAGE) and is governed by the Manitoba Teachers’ Society (MTS). MTS is the collective bargaining and professional development organization for all of Manitoba’s 16,000 public school teachers. During the discussions, it became evident that the logistics for MSLA merging with MLA and withdrawing as a SAGE of MTS would not be feasible nor in MSLA’s best interest. To make matters more complex, at the time, MSLA leadership was involved in working towards establishing a National School Library Association. The Canadian School Libraries (CSL) incorporated in February 2017, thus ensuring the national participation of MSLA members via CSL, which in turn is a member of CFLA-FCAB.

Like MSLA, MAHIP also holds formal ties with a parent body: the Canadian Health Libraries Association (CHLA-ABSC). CHLA-ABSC is also a member of CFLA-FCAB. In its final report, the Working Group defines a Division as approximately 75 members. Because MAHIP reported only 14 members in 2016, it was too small to become a Division of MLA.

The final stakeholder that participated in the discussions towards an amalgamation of Manitoba library associations was the Manitoba Libraries Consortium Inc. (MLCI). Its membership comprises only library institutions, and the membership is represented by the library directors. Its strategic priorities and mission are much different than those of a provincial library association. While the MLCI Board of Directors played a supportive role during the amalgamation and was part of the Working Group, it did not dissolve its organization to become a division of MLA.

### ***Leading Change***

Since the amalgamation, advocacy efforts, revenues, and membership have increased, and numerous efficiencies have been gained. The infrastructure supporting the MLA conference has been improved, and the board is a cohesive and more diverse unit. In 2020, MLA will undergo a strategic planning process that will reinforce the identity and direction of the newly restructured association.

Orchestrating change is a huge undertaking. It is complex and difficult and requires dedication, patience, compromise, and creativity. The change leader and team must deal with lawyers, accountants, multiple boards, their board members, and memberships. For MLA, the process took over three years. Today, MLA is a stronger and more viable organization with outstanding growth potential. In today's landscape, where budgets are in flux and time is limited, associations must continuously challenge themselves to think critically about their processes in order to maximize their value and impact. If the purpose of a library association is to lead libraries forward, leaders must always be looking inward to accomplish more.

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