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Library and Archives Canada: A Case Study of a National Library, Archives, and Museum Merger

Library and Archives Canada, more commonly known by its acronym, LAC, is a federal government institution. It was created in 2004 from two predecessor institutions, the National Library and the National Archives, both of which enjoyed highly respected, long-standing professional traditions. The former National Library was founded in 1953. It could be compared to the Library of Congress, though it was about ten times smaller and did not have a mission to serve the Parliament, which has its own library. The National Library existed to serve Canadians and Canadian libraries. The former National Archives, founded in 1872, could be compared to the National Archives of the United States, though again it was about ten times smaller and had responsibility for culturally significant private archives as well as government records.

LAC was established by the enactment of the Library and Archives Canada Act. Its foundational charter was a document titled "Directions for Change." Visionary and strategic, both the act and the charter set LAC on a course to become a new kind of knowledge institution: a truly national institution, a prime learning destination, and a leader in governmental information management. But while governmental information management is an important function of LAC, accounting for about a third of its resources and efforts, I will focus here on the rationale for creating LAC and the lessons that we have learned from the merger.

What then was the impetus for the merger? Prior to 2004, the National Library and the National Archives occupied two prime pieces of federal real estate across the street from one another. Staff from both institutions operated in both buildings. Both institutions produced excellent work, but dwindling resources and the technological revolution underscored the need to create a single government focus for the management of Canadian documentary heritage. As James Michalko urges in his article later in this issue, we needed to create scale. Scale and efficiency were the real drivers behind the creation of LAC. Yet beyond that, I think that the leaders of

the National Library and the National Archives were convinced that what archives and library professions had in common with one another was greater and more important than what distinguished them. The situation had become one where, to paraphrase the former Director of the Institute of Museum and Library Services in the United States, Robert Martin, the boundaries had blurred to the point where they were no longer justifiable to our end users, or to the institutions themselves.

The preamble to the Library and Archives Canada Act states that Canada should be served "by an institution that is a source of enduring knowledge accessible to all, contributing to the cultural, social and economic advancement of Canada as a free and democratic society." Certain key phrases stand out in this statement: "enduring"; "accessible to all"; "cultural, social and economic advancement"—these are important themes, including, and perhaps especially, the last: the connection of libraries and archives and museums to economic prosperity.

A little Canadian context helps one to appreciate the geographical challenges that LAC faces in providing equitable access to the nation's documentary heritage. In terms of land mass, Canada is geographically the second largest country in the world, yet our population, just over 32 million, is smaller than California's, which is slightly over 36 million. Ottawa, the nation's capital where LAC is situated, is a small city. It has a population of one million, though that size has only recently been achieved. Most of the population base in Canada is located in the cities of Toronto, Vancouver, and Montreal. Our distributed demographics create real challenges to serving our audiences.

The legislation that brought together the National Library and the National Archives also brought with it an expanded collecting mandate. The broad mission of LAC now includes the collection and preservation of published or unpublished documentary heritage regardless of medium; the extension of legal deposit to include online publications and the archiving of a sampling of Canadian Web sites; and the authority to request the transfer of at-risk federal government records from local repositories. As a result of the merger, we are starting to realize that our acquisition strategies have to change. We are becoming more forcefully aware that we cannot be the only institution responsible for the acquisition and long-term preservation of our documentary heritage, nor can we continue to target only material of national significance and leave the rest to other institutions. Acquisition and preservation are areas that call for more and more cooperation, not just because of our financial constraints, which are real, but also because of the breadth and diversity of our documentary heritage. I believe that this must become a matter of public discussion. More coordination is needed because, as we know, only a small percentage of what is produced by our society is actually acquired and

preserved by our cultural heritage institutions. To this end, LAC has begun to lead an important national discussion aimed at formulating a comprehensive strategy for the acquisition and preservation of digital information. Thus far, it has become clear that the only viable model is a decentralized one in which many institutions cooperate to achieve common goals.

LAC also has a public programming mandate that holds significant potential for serving museum functions and even creating museum-like buildings. Our founding legislation makes it clear that our charge is not solely to provide access to information, but to increase understanding of the Canadian experience—to generate new knowledge and not just transfer it. This is a marked change from the past. Previously, the National Library and National Archives would move cautiously and conservatively in their programming strategies. Now, however, we have a basis from which to go forward more boldly, more creatively, and more innovatively. We have determined that in our role of nation building, LAC should make a personal and emotional connection with Canadian citizens. Regardless of how visitors approach us, we want them to relate to the experiences embodied by our collections: the lives of individuals featured in a portrait gallery, in a soldier's records, or in a photograph of rural or city life. New Canadians must have opportunities to learn about how Canada has been shaped and what constitutes Canadian identity.

In renovating our physical facilities, we have gone from having floors dedicated to specific disciplines to an integrated, one-stop access layout, with a reference model that basically works like a triage system in an emergency room. All visitors come to one location where their specific request and level of need are quickly assessed. Users who have specialized needs or who require assistance to search for information are referred accordingly, while users who can self-serve are directed to another area.

Meanwhile, in our online environment, we are moving from discrete databases and catalogs, which often required staff mediation to navigate, to a federated, self-service search mechanism. The system is only in its first phase, and there are still a number of bugs and glitches to be worked out, but it is very exciting and certainly the way we will go forward.

We have begun using performance measurements to tell our story internally to decision makers in LAC, and also externally to government policy makers, to convince them that access is as important as preservation. We will rely on new mechanisms such as federated search capacity to generate new data, and we will work on developing the right measurement tools. We cannot leave assessment to anecdote and afterthought.

The change process of the past three years was an enormous undertaking, and it is not over. Nevertheless, I believe that we are now ready to embrace our new mandate, which includes developing partnerships, managing risks, and ensuring appropriate accommodation for everyone grappling with the challenges of the Information Age. We have shifted from a vertical siloed approach to access services to a horizontal strategy. Improving access is the main driver for determining our new organizational structure. Our goal is to provide unparalleled access to broad and deep information about Canada, and we are determined to use sophisticated information architecture and technology to achieve it. Client focus is fundamental. We aim to meet the needs of Canadians across our vast geographical territory, with its widely dispersed pockets of population, by offering multichannel services, reaching people where they live through virtual reference, digital content, and digitization on demand. We will develop innovative programs to promote and interpret our heritage. We will foster lifelong learning.

Canada is one of the most wired nations in the world, but income and geography still impede our technology. Like other countries, we have a digital divide. Studies have shown that nearly eight out of every ten Canadians, men and women alike, access computers at least occasionally. The Canadian government has invested heavily to achieve this outcome, but, not surprisingly, education and income level still determine who actually uses technology. Certain populations of concern to the government are not yet benefiting from the investment in technology. Bridging those gaps will require innovative partnerships of the kind that are more common in the United States. One, called the Partnership for our Nation of Learners, extends beyond museums, libraries, and archives to include public broadcasting.

The tension between virtual and in-person service is huge. "Trust" is a major issue for our regular users. I asked one government historian who is a frequent visitor how he would feel about doing all of his research online. He reacted very strongly against the concept. When I asked him why, he said, "I would then have to trust whoever digitized those records, and I could never do that." My staff told me that he had had to learn to trust microfilm and he did manage to do that, so they are confident that in time he will also learn to trust the new digital media.

We expect that new audiences will increase the demand for mediated access to collections. Self-sufficiency is important and one of the goals that we aim to support. Nevertheless, as we have solicited the interests of larger shares of our citizens, and as they have begun to tap into our resources, we are finding that, although they want authoritative advice on all types of content, they are also seeking to have it interpreted.

Library, museum, and archival professionals care about the distinctions between different kinds of collections and documents, but most users do not. The conventions that led to the establishment of professional and administrative boundaries are based on outmoded business models, in my opinion. At best, they could be called "closed models," but today's world requires open models.[1] You must look beyond your own boundaries for ideas and include your customers in the process.

You need to know your customers: the ones you have now, the ones you want to have, and the ones that you ought to have. You need to make a real connection with each of them, with the records and the literature that they are seeking. But what does this mean in functional and practical terms? It could mean creating a segmented approach to service delivery. It could mean creating playlists for different kinds of documents. It could mean creating click-throughs that have already taken account of issues relating to cost and copyright.

Next to access, funding continues to be a major driver for LAC. Securing resources often involves a chicken-and-egg dilemma. Creating and demonstrating demand means achieving relevance and therefore survival, but it takes resources to meet the increased demand. Controlling demand can help protect staff from overwork and burnout, but such a strategy risks alienating users.

LAC's role in the Canadian government agenda involves not only lifelong learning and literacy but also economic advancement. Great Britain made a brilliant move when it legislated that the Department of Education and the Department of Industry provide partial sponsorship for the British Library. This meant that the British government could enable the British Library directly to impact the economic prosperity of the nation. This is particularly important if you accept the premises that Thomas Friedman has outlined in *The World is Flat*, namely that we all must become better learners, and lifelong learners, to survive in the new world order.[2]

I conclude with some lessons that we have learned from the merger that created LAC. First, we have found that managing pace is key. Much of the literature on managing change advises moving quickly and unrelentingly. I would add that you need to deliver on your first round of commitments before you go on to the next. Otherwise, you lose credibility with your staff and your audiences.

1. See Henry William Chesbrough, *Open Innovation: The New Imperative for Creating and Profiting from Technology* (Cambridge, Mass.: Harvard Business School Press, 2003), and Chesbrough, *Open Business Models: How to Thrive in the New Innovation Landscape* (Cambridge, Mass.: Harvard Business School Press, 2006).

2. Thomas Friedman, *The World Is Flat: A Brief History of the Twenty-first Century* (New York: Farrar, Straus and Giroux, 2005).

A sink-or-swim approach will polarize your professional staff. If you throw librarians and archivists and museums professionals in a room and tell them to get along and play nicely, they will not. They must make their own moves toward convergence. They have to see the new vision and understand that their strengths will contribute to its realization. Yet, during this process, they must be directed to focus on the key skills that will be needed to move forward and to let go of irrelevant practices and outmoded business models.

Second, everyone on your management team has to be on the same page. Do not spend time trying to change managers who are unlikely to change. It will undermine your ability to achieve progress. Instead, work to create the right conditions for change, which means getting the fundamentals right: good human resources, good finances, good performance measurement. This means doing the boring stuff; but if that part is done well, then your professionals will gain the courage they need to accept the new vision and to move forward with creating an institution that is truly relevant in this brave new world.