
Library Board Governance Review - 2021

Overview

- At the Library Board Meeting held October, 18, 2021 the Chair initiated a discussion regarding future governance of the County's Library services to inform the following key issues:
 - Retiring CEO/Chief Librarian
 - Recruitment process for CEO/Chief Librarian successor
 - Reporting structure for CEO/Chief Librarian
 - Current dual reporting structure – reporting to Board (direct reporting structure) and County Administration (broken-line reporting structure)
 - Separate business entity (Library Board) or integrated with County departments
 - Board governance or Council governance
 - Public involvement in Library governance
 - Councillor involvement in Library governance
 - Public/Councillor composition in Library governance
 - Public involvement in Library services – Friends of the Library
 - Public interest in governance or in services (traditionally minimal response to Board recruitment of citizen appointments)

Background

- Provincial legislation prescribes the establishment and operations of a county library service under Public Libraries Act
 - Requires Council to appoint at least five members to a board that oversees and governs library services
 - Shall not appoint more of its own members to a board than the number that is a bare majority of the board
 - Appointments for new board shall be made at a regular meeting of council within 60 days after its first meeting
 - Board shall hold at least seven regular meetings each year
 - Sections 29 and 30
 - 29 (1) The council of a municipality, a local service board or the council of an Indian band may, instead of establishing or maintaining a public library, enter into a contract with a public library board, union board or county library board for the purpose of providing the residents of the municipality or local service board area or the members of the band, as the case may be, with library services, on the terms and conditions set out in the agreement

- 30 (3) Where a regional municipality has established a public library board, the Minister shall make a grant to the board for library purposes as if it were a board under this Part.
- Report No. CS 2019-05 titled “Library Board Governance” was presented to Council as a means for improving ability to achieve quorum at Board meetings and meet the required number of regular meetings to be held in each year, with adoption of the following:
 - reduce the size of the Library Board from nine to seven and amend the Terms of Reference to recognize the Warden in determining if a quorum of members is present to conduct a meeting; and
 - authorized staff to explore legislative change options necessary to recognize County Council as the board for Oxford County Library Services
- Regional Service Review announced in early 2019 – prompting a Joint Service Review including the County and Area Municipalities
 - Library services – excerpts from Oxford County 2019 Service Delivery Review
 - Key trends and best practices for public library services include: co-location with other community facilities and extended community use of library space; consortium purchasing to ease the rising cost of materials; accommodation of social service providers; increased programming; non-traditional item lending; extended technology and creative resources (e.g., Wi-Fi, maker spaces, digital editing studios, etc.); and community librarianship models and outreach services
 - Opportunities - Greater coordination of library services: Oxford County Library and Woodstock Public Library may find efficiencies through shared staffing, collections, programs, subscriptions, and more. Although there are historic agreements, library boards, and union contracts to consider, there may be benefits in exploring a closer working relationship between the two systems.
 - Opportunities - Community librarianship and external services: The public libraries may wish to further explore opportunities to work with local organizations and coordinate off-site library services such as mini-libraries, bookmobiles, etc.
 - Trends and Best Practices
 - External service delivery is emerging as a trend in many municipalities - bookmobiles, literacy outreach and “pop-up libraries” are becoming popular alternatives or additions to traditional bricks-and-mortar libraries
 - Co-location of facilities and services (e.g., library, recreation, culture, civic space, etc.)
 - Resource-sharing and coordinated schedules between branches, as well as consortium purchasing and interlibrary loans
 - Facility booking / community use / expanded programming
 - Public library services benefit from emerging and shared technologies
 - Libraries as spaces for social services (e.g., blurring of lines of responsibility for mental health, homelessness, additional issues)
 - Community librarianship model allows libraries to tailor their services and delivery to meet the unique needs of the community
 - Service Delivery Report was silent on Board Governance other than citing the Public Libraries Act

- At the Library Board Meeting held October, 18, 2021 the Board directed staff to assess the pros and cons of the following Board governance scenarios:
 1. Status quo
 2. Library services included as a division or department within the County’s structure
 3. Library Board with increased public member representation
 4. Library Board without support from County staff
- For the purpose of responding to the Board’s direction, staff referred to the following sources:
 - Public Libraries Act
 - Ontario Library Services – Brandon Fratarcangeli, M.A., M.I., Consultant
 - City of Brampton Service Delivery Review, November 29, 2019
 - County of Elgin – Julie Gonyou, BA (Hons), MPA, Chief Administrative Officer, former Deputy City Librarian, City of London and Chief Executive Officer of Middlesex County Library
 - Lambton County Library Strategic Capacity Plan, September 2013

Comments

- Pros and cons identified for each of the four options as set out below are not exhaustive and are provided for discussion purposes
 - Further research may be required to determine if certain of these items listed could be achievable or avoided, as the case may be

1. Status Quo	
Pros	Cons
Library Board is autonomous, reporting to Council once a year as part of budget deliberations	Additional meetings for Councillors appointed to the Board
County staff provide quarterly library business plan and budget updates to County Council included in departmental reporting	
Shared Support Services - IT, Finance, Human Resources, Facilities, Legal, Strategic Communications	No formalized shared service level agreements (SLA) to restrict service level improvements when required – examples being, flexibility to support changing Library services by offering access to: innovative technologies; broader community participation; programming facilitation; and social and cultural experiences
Policy development and maintenance	Duplication – i.e. Policies and Diversity, Equity and Inclusion Committee
Headquarters presence in County administration building accommodates Library staff development sessions – avoiding cost of large meeting space rentals	

1. Status Quo	
Pros	Cons
Participation in corporate staff training opportunities such as Oxford Grows, IT security, health and safety, etc. – typically no additional cost to Library budget	
Economies of scale from County operations	
Allows all County Councillors to participate in governance of library services in a limited capacity	Does not allow all County Councillors to participate in governance of library services
	Not enough integration with other departments

2. Library services included as a division or department within the County’s structure	
Pros	Cons
Clear accountabilities and reporting for the CEO/Chief Librarian	
Eliminates Board members annual performance evaluation based on limited exposure to performance – not fully informed	
No requirement to appoint Treasurer and Secretary	
Eliminates additional meetings for Councillors appointed to the Board	
More time for staff to plan and manage library services, and engage with the community by eliminating preparation and conducting Board meetings – arranging meeting spaces, preparing agendas, reports, correspondence, minutes and travel; assisting in Board layperson appointments as required	
More integration with County services - innovative technologies; broader community exposure; programming facilitation; and social and cultural experiences	
Enhance public awareness and participation by employing local public advisory committees – for	

2. Library services included as a division or department within the County's structure	
Pros	Cons
each branch or one committee to cover multiple branches in a municipality	
Headquarters presence in County administration building accommodates Library staff development sessions – avoiding cost of large meeting space rentals	
Participation in corporate staff training opportunities such as Oxford Grows, IT security, health and safety, etc. – typically no additional cost to Library budget	
Economies of scale from County operations	
Membership in Ontario Library Association - no change for access to OLA membership	Loss of access to Ontario Library Service (OLS) including: Inter Library Loan (OLS) consortium (could still request title from libraries independently); E-resources at reduced rates for bulk purchasing; E-book consortium in contract with OverDrive may be subject to a set up fee; may need to purchase a server; consulting services; would have to pay for training; Integrated Library Service (ILS) circulation software; annual maintenance and support costs of approximately \$27,000
	Loss of annual provincial public library operating grant of \$135,675 and pay equity grant of \$3,229 for a total of \$138,904 (this amount has been static for 20 years)

3. Library Board with increased public member representation	
Pros	Cons
All pros listed under Status Quo option would apply	Increase in cost of board governance for per diems and travel for each additional layperson (current per diem is \$420/annum)
	Difficulty in attracting and retaining citizen appointments

4. Library Board without support from County staff	
Pros	Cons
	Would require a treasurer to be appointed from library staff
	Human Resources, Information Technology, Strategic Communications and Facilities Management supports would have to be added to FTE complement in library services or outsourced – may result in overall cost increase to the taxpayer as County staff complement would not likely change as a result of not supporting library services

Other Governance Models in the Province

- Region of Waterloo
 - Regional Council functions as the Library Board
- Elgin County
 - County Council functions as the Library Board
- Lambton County
 - County Council functions as the Library Board
- County of Lennox and Addington
 - County Council functions as the Library Board
- City of Mississauga
 - Library is a division within the Community Services Department of the City – adopted in 1995 with a motion from Council and c of both the Mississauga Library Board and the Province
 - Board maintains control over library operations and policy – no SLAs were entered into as they were not required by the PLA at the time – very integrated with the City administrative structure
- City of Markham
 - Library is a division of the Fire and Community Services Department of the City – CEO
 - Remains administratively accountable to an independent library board and the Commissioner of Fire and Community Services
 - Library operations are designed in closer collaboration with the City while still maintaining its independence
 - City provides IT services via Shared Services Agreement as well as informal assistance in Finance, HR and Procurement in conjunction with library staff

- City of London
 - Autonomous Library Board reporting to Council once or twice per year as part of budget deliberations
- County of Middlesex
 - Library Board is autonomous but work closely with County Council – CEO/Chief Librarian dual reporting to County CAO and the Library Board, attending all County Council meetings and providing monthly reports to Council

Other

- Innovative Approaches pages 72 – 75 – City of Brampton Service Delivery Review – Brampton Library, November 29, 2019
- Lambton County Library Strategic Capacity Plan – recommends not changing the distinctive governance structure of Lambton County Library, but recommends implementing two strategies to better engage the community and provide further support to county politicians as they make decisions about the future of the Library
 - if interest is expressed by the community, creating an advisory committee comprised of non-elected community members representative of Lambton communities where branches exist; or striking one committee with a system-wide focus with smaller sub-committees for each branch or set of branches within one municipality
 - establishing a Friends of the Library group Friends of the Library associations offer many benefits to organizations, including engaging passionate volunteers to support various events and fundraising activities (e g , used book sales) and acting as external champions to advocate on important issues
- Elgin County has been contacted by several other municipalities in the past four years enquiring how Elgin County made the transition from Library Board to Committee of the Whole
- Elgin, Lambton and Lennox and Addington transitioned away from Library Boards in the 1980's vis-à-vis private members bills
- Region of Waterloo elimination of a library board was done by amendment to the Municipal Act in 1990

Prepared for: Oxford County Library Board

Further information: Lynn Buchner, Director of Corporate Services
Michael Duben, Chief Administrative Officer

ATTACHMENTS

[Attachment 1](#) – Report No. CS 2019-05 titled “Library Board Governance”, January 23, 2019

[Attachment 2](#) – City of Brampton Service Delivery Review, November 29, 2019

[Attachment 3](#) – Lambton County Library Strategic Capacity Plan, September 2013

To: Warden and Members of County Council

From: Director of Corporate Services

Library Board Governance

RECOMMENDATIONS

1. **That County Council authorizes staff to explore legislative change options necessary to recognize County Council as the board for Oxford County Library services;**
2. **And further, that staff bring forward the necessary authorizing by-law for Council to amend the composition of the Library Board from nine to five members, comprised of three members of Council and two citizen members;**
3. **And further, that the Striking Committee bring forward Council and Lay Member appointment recommendations at the February 13, 2019 regular Council meeting.**

REPORT HIGHLIGHTS

- Provincial legislation prescribes the establishment and operations of a county library service under Public Libraries Act
 - Requires Council to appoint at least five members to a board that manages and controls library services
 - Requires regular meetings once per month for at least 10 months each year
 - A Library Board to be appointed to assist in facilitating legislative change to deem County Council to be the Oxford County Library Board

Implementation Points

Upon approval of the recommendation contained in this report staff will work with the Library Board to facilitate the process of transitioning to a Library Board represented by County Council and to assure the community that Oxford County library services will continue to be delivered in a manner focused on service excellence that meets our community's needs now and in the long-term.

Financial Impact

The recommendations contained in this report will have no financial impact beyond what has been approved in the current year's budget.

The County Treasurer has reviewed this report and agrees with the financial impact statement.

Risks/Implications

Pursuing a consolidated service delivery model for library services may be perceived by the public as a loss of public opinion and input. To address those concerns Council will have to reassure the public that library services will not suffer as a result.

The risk of operating beyond the legal limits of the Public Libraries Act would mean that the Ministry would withhold the annual operating and pay equity transfer payments to Oxford County Library services. The loss of these funds would not occur as long as Council remains compliant with the PLA while pursuing alternate governance model options.

Strategic Plan (2015-2018)

County Council adopted the County of Oxford Strategic Plan (2015-2018) at its regular meeting held May 27, 2015. The initiative contained within this report supports the Values and Strategic Directions as set out in the Strategic Plan as it pertains to the following Strategic Directions:

- 3. iii. A County that Thinks Ahead and Wisely Shapes the Future** - Demonstrated commitment to sustainability by:
- *Ensuring that all significant decisions are informed by assessing all options with regard to the community, economic and environmental implications including:*
 - o *Life cycle costs and benefit/costs, including debt, tax and reserve levels and implications*
- 5. ii. A County that Performs and Delivers Results** - Deliver exceptional services by:
- *Conducting regular service reviews to ensure delivery effectiveness and efficiency*
 - *Developing and tracking key performance indicators against goals and report results*
 - *Identify best practices and appropriate benchmarking*

DISCUSSION

Background

This report is prepared in response to staff direction received at a special meeting of Council held December 17, 2018, for the purpose of dealing with Report No. WDN 2018-02 titled "Councillor Appointments to County Boards, Committees and External Agencies", at which County Council passed a resolution adopting the following recommendation of the Striking Committee:

“And further, that staff be directed to submit a report exploring alternatives to an Oxford County Library Board”.

At the beginning of each term of Council, County Council appoints its members to various boards and committees of Council as well as external agencies who require County Council representation under requirements of the provincial legislation that established and governs the respective agencies. The terms of these appointments are either prescribed by provincial legislation or by municipal resolution and/or by-laws if not set out in provincial legislation.

The Public Libraries Act (PLA) is the provincial legislation that authorizes public library service delivered through municipalities with appointments from municipal councils and members of the community in which the library serves. More specifically, the PLA states that a county library shall be under the management and control of a board. The composition of a county library board is set out in subsection 9(3) of the PLA which states that the board shall be composed of at least five members appointed by county council and subsections 10(2),(3) and (4) state that the appointing council shall not appoint more of its own members than a bare majority of the board for the same term as the appointing council and shall do so within 60 days after its first meeting.

The legislation also speaks to disqualification of a board member if they are absent from meetings for three consecutive months without being authorized by board resolution; requirement for regular meetings once per month for at least 10 months each year; and quorum being required to constitute board meetings.

Comments

Over the course of the past two terms of Council, the Oxford County Library Board has had difficulty in achieving quorum and has had to grant extended leaves to members on a couple of occasions and on many other occasions absences of three consecutive meetings went unrecognized as the absences were not anticipated in advance of the meetings.

In recognition of this challenge, in March 2018, the Board amended their Terms of Reference to allow the Warden, who sits on the Board as an ex officio member, to be counted as part of quorum.

To further address the ongoing challenge of achieving quorum at meetings, the Board Chair requested staff to investigate and report on legislative requirements pertaining to Board meetings. In response, at the June 18, 2018 Board meeting, Report No. 2018-14 was presented to the Board for discussion purposes. The report presented the legislative requirements as cited earlier in this report as well as suggesting remote attendance for some members who travel up to 40 minutes or more to attend meetings that are typically no longer than 30 to 60 minutes in duration, and sometimes less.

Although the PLA is silent on Board members having remote access to meetings and if they would be counted as part of quorum, in the event that the entire Board were to participate remotely through teleconference or videoconference connections this would not meet the PLA requirement for meetings to be “open to the public”, with the exception of prescribed matters of which can be dealt with in “closed session”.

Alternatively, the staff report suggested the option of changing the timing of the meetings to be held either before or after County Council meetings with the intent to make more efficient use of Board members time required to travel to and from meetings. Another option presented was to change the composition of the Board from the present complement of nine members – five County Councillors (bare majority) and four citizen appointees. There was no action taken in response to the discussion initiated by this report.

Upon receiving staff direction from County Council on December 17, 2018, staff has undertaken a brief but informative investigation of alternatives for library boards. The investigation has included consultation with the Ministries of Tourism, Culture and Sport (MTCS); and Municipal Affairs (MMA).

Ministry of Tourism, Culture and Sport Consultation

It is the position of the contact person at the MTCS – Library Services Branch that the PLA sets out that Council must have a bare majority of members on the board. That means Council could change the number of councillor appointments to the board to a few as one as long as they appoint four citizen appointees to round out the complement to the required five board members. He also confirmed that meetings could be held by remote attendance but must be able to confirm who is in attendance and must be held in a manner that allows the meeting to be open to the public. Notwithstanding the Region of Waterloo and the Counties of Elgin, Lambton and Lennox and Addington, whose Councils act as their library boards, he strongly encourages Council not to pursue private legislation as there are 260 library boards operating very efficiently across Ontario. As for the four municipalities who have Council deemed to be the board, the Municipal Act was amended in 1990 for Waterloo’s Regional Council to be the board of their county library services for the purposes of the PLA, while the Counties of Elgin, Lambton and, Lennox and Addington were authorized under private bills passed in the 1980s.

Consistent with the remaining 254 library boards, these municipalities still receive annual operating and pay equity grants for library services from the MTCS and occasional capital/capacity grants for special library purposes. However, he indicated that if the County were to operate outside of the legal framework of the PLA, the MTCS would withdraw funding in accordance with section 41 of the PLA and would ask SOLS to withdraw services – SOLS being a consortium for library services providing inter-library loan, inter-library courier delivery, consultancy services, purchasing, and education and training opportunities. The consequence for Oxford’s library service therefore, would be the loss of approximately \$139,000 in annual transfer payment revenue from the province (\$135,675 operating + \$3,229 pay equity), an amount of which has not changed for at least 17 years.

In addition, our library service would lose access to the provincial e-book consortium, as well as membership in the Ontario Library Consortium which provides us with our Integrated Library Software, other software, data storage, consultancy services and support.

As confirmed by the MTCS contact person, there is only one mechanisms in the PLA for dissolving a county library board. Section 42 of the PLA states that the Minister may dissolve a library board where the board has, during the two year period immediately preceding the dissolution, not maintained and operated a library.

Ministry of Municipal Affairs Consultation

The contact person at the MMA – Local Government Policy Branch, was not able to find any governance flexibility beyond what is in the PLA that might avoid legislative change, including the Municipal Act (MA) and its regulations. He did caution that the legislative change process is lengthy and it might not be possible before the next term of council. He also advised we seek a legal opinion if it is Council's desire to pursue this course of action.

Municipal Consultations

Contacts were also made with each of the municipalities in the Province who have a library board governance model that resembles Oxford County's former public health board governance model in which Council was deemed to be the board. Two of the municipalities have standing committee systems, in which a committee meets four times per year to deal with library service matters that are then presented to Council for final approval. Since Council is deemed to be the board, they are compliant with the PLA in terms of number and frequency of meetings. The other two municipalities' Councils deal with library matters in the same manner as Oxford County Council previously dealt with public health matters.

In response to the series of standard questions that were asked of each of the municipal contacts, the responses were all consistent regardless of the presence of the standing committee. All municipalities continue to receive their annual operating and pay equity transfer payments from the province as well as occasional one-time funding opportunities to support special library service related initiatives. Three of the municipalities continue to participate in the SOLS consortium and the one that does not opted out to partner with another municipality that offered the same services for a lower cost.

In terms of advantages, that fact that library business is dealt with during regular Council and/or Committee meetings, there are no additional meetings that are cause for scheduling and paying attendance and travel costs. They are able to take advantage of municipal administrative supports such as human resources, finance, IT and facilities. A consolidated model relieves many of the duplicated requirements for regular and special council meeting that are replicated under the PLA such as meeting notice provisions, closed session matters and conflict of interest legislation. Overall they expressed considerable efficiencies as the most advantageous to the municipality and taxpayer in terms of economic and human capacity savings.

When asked about disadvantages, one municipality expressed the need to be more conscience about public engagement, although they find that the model does provide advantages in public engagement as councillors and staff have a broader view of the community which tends to draw in community members that have not always been familiar with library services, which is particularly important as the library service is trending more into community culture building than as standalone resource centres.

Public engagement was another key question that was explored, more specifically how they ensure that public opinion is considered in the level of library service in the absence of citizen members on a board. In response, all felt that they took measures to engage the public through regular consultations at the branch level as well as the broader community level and design tactics to fit the situation. As examples, they referenced holding town hall and citizen information sessions for special projects they are undertaking such as remodeling a section of a library branch or setting strategic initiatives for the term of council, while branch hours would be reviewed with consultation through branch specific surveys. Again it was expressed that their model allows a broader community focus to ensure all aspects of the community's wellbeing are considered in municipal service decisions. None of the municipalities have established citizen appointed advisory committees or friends of the library as there has not been interest expressed within their communities.

Oxford County Library Board Model

Oxford County library services are well integrated within the County's administrative support services as it enjoys the expertise and efficiencies of shared human resources, finance, IT and facilities services. That is not to say that there would not be savings in terms of costs and human capacity with the elimination of a separate board. The monthly meeting has to be scheduled for councillors to attend who also has two County Council and up to two Area Municipal meetings per month in addition to their respective travel costs to attend those meetings. It also takes considerable staff time to prepare monthly reports, agendas, minutes, etc. to facilitate board meetings, some of which would otherwise be coordinated with regular council agenda work within the Clerk's office. In terms of cost savings, in addition to staff time savings that would be reallocated to other productive library related service to the public, the absence of a separate board would result in approximately \$3,000 in direct costs for board member per diems and travel costs on an annual basis.

Conclusions

In summary, the Oxford County library board model as it exists is very efficient and places high priority on public engagement within the community, nonetheless, there are obvious concerns in regards to maintaining compliance with the PLA as it relates to board meeting frequency due to historical quorum issues. As well, initial consultation with Ministry staff indicated the necessary legislative change could be a long process. As such, staff recommend Board composition changes that, in the immediate term, provide enhanced opportunity to meet the PLA requirements for meeting frequency. As well, it is recommended that Council authorize staff to further explore legislative change options that would allow Council to operate as the Oxford County Library Board.

SIGNATURES

Report Author:

Original signed by

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Chief Librarian/CEO

Departmental Approval:

Original signed by

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Director of Corporate Services

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Original signed by

Peter M. Crockett, P.Eng.
Chief Administrative Officer



City of Brampton Service Delivery Review

Category 7 – Brampton Library

Final Report
November 29, 2019

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NOTICE

Ernst & Young LLP (EY) prepared the attached report only for the City of Brampton ("The City," "Brampton," "Client") pursuant to an agreement solely between EY and Client. EY did not perform its services on behalf of or to serve the needs of any other person or entity. Accordingly, EY expressly disclaims any duties or obligations to any other person or entity based on its use of the attached report. Any other person or entity must perform its own due diligence inquiries and procedures for all purposes, including, but not limited to, satisfying itself as to the financial condition and control environment of The City and any of its funded operations, as well as the appropriateness of the accounting for any particular situation addressed by the report.

While EY undertook a thorough review of government spending per the terms of agreement, EY did not perform an audit or review (as those terms are identified by the CPA Canada Handbook - Assurance) or otherwise verify the accuracy or completeness of any information provided to us of The City or any of its funded operations financial statements. Accordingly, EY did not express any form of assurance on accounting matters, financial statements, any financial or other information or internal controls. EY did not conclude on the appropriate accounting treatment based on specific facts or recommend which accounting policy/treatment The City or any funded operations should select or adopt.

The observations relating to all matters that EY provided to The City were designed to assist The City in reaching its own conclusions and do not constitute EY's concurrence with or support of Client's accounting or reporting or any other matters.

Context and Purpose

Project Context

The City of Brampton undertook a prior external service review which concluded in May 2019. That service review identified a number of different opportunities to be further investigated during subsequent reviews. The City of Brampton has since launched a series of further reviews across the organization, including this review with the Brampton Library. This review is being conducted according to the timelines associated with the Audit and Accountability Fund, and the final report from this review will be made public.

Purpose of the Assessment

This assessment is intended to identify opportunities for the Brampton Library to deliver services more effectively, efficiently, and / or economically. As part of this review, the City is also looking at opportunities for transformation, including opportunities to introduce new technologies, governance models, and other mechanisms to provide sustainable levels of service to the growing community in the City of Brampton. The scope of this review focuses on organizational design and governance, a benchmarking analysis, and opportunities to improve processes.

The review acknowledges the role Brampton Library has in supporting lifelong literacy, equitable access to programming and technology and as a community hub for residents.

Data and Cost Saving Estimates Assumptions

- Budget 2018/19 Library costs have been used to calculate the current cost of service delivery (base case).
- Calculations for cost savings estimates analysis have been performed using input assumptions and data provided by the Brampton Library and the City of Brampton's Finance Department team ("the management team"). Inputs to the analysis are the sole responsibility of the management team.
- The analysis herein is in summary form. Selecting portions of this analysis without considering all of the factors and analyses considered, may create a misleading view of the output and results.
- Calculations have been based on specific assumptions noted in the appendix to this report. Not every potential influence or factor has been considered including, but not limited to, negotiated changes with union representatives, inflation, and the impact of overhead costs.

Executive Summary

Scope of Review

In September of 2019, EY was retained to conduct a service efficiency review of the Brampton Library. The scope of this review encompassed the following key activities:

Organizational Structure Review

- ▶ A review and validation of the existing organizational structure for relevance and operational efficiency
- ▶ A review of the Library's existing governance structure and opportunities to look at alternative governance models

Benchmarking analysis

- ▶ A benchmarking analysis and jurisdictional scan of comparable jurisdictions which will consider:
 - Cost effective service delivery methods to support growth and a diverse population
 - Types of facility models including the ratio of facilities/population
 - Types of programming and value add services
 - Budget allocations
 - Resourcing
 - Cost per capita
 - Leading practices

Process Improvement Opportunities

- ▶ A review of current processes and service level agreements to identify opportunities for streamlining and automation and / or to strengthen efficiency

Context for Brampton Libraries



Service Description

- Brampton Public Library is a network of eight Library branches governed by the Brampton Public Library Board.
- Provincial operating funding comprises 2.02% of Brampton's operating revenues, with contributions from the City making up the vast bulk of the remaining operational funding.
- Additional Provincial operating and capital grants in addition to the Provincial Library Operating Grant are available and have been access for specific purposes.
- The Library provides a number of services including traditional library collections lending, access to online platforms, numerous community programs, maker spaces, study spaces, a mobile Library bookmobile and access to free Wi-Fi.
- The Library also performs a significant amount of community outreach and engagement, particularly with Brampton's diverse community groups.

Why Review Brampton Libraries?

- KPMG's initial Service Efficiency Review identified possibilities for Brampton Libraries and Brampton's Recreation department to collaborate more on programming initiatives.
- Between this opportunity and the broader imperative to review the City of Brampton's operations holistically, including a broader review of the Library focused on organizational structure, benchmarking and comparative analysis, and process improvement opportunities.

Key Findings – Brampton Libraries

The following key findings have been identified through a combination of stakeholder interviews, document review, jurisdictional analysis, and prior project team experience. These findings have been reviewed by Brampton Library leadership.

Key findings



Brampton Library is fiscally effective compared to other jurisdictions, despite being a smaller library system

Brampton's expenditures per capita (\$29.84) on Public Libraries are considerably lower than other Ontario jurisdictions while serving more residents with fewer branches than comparators.



Brampton employs the traditional organizational model for Library services. Other governance models exist in Ontario, but changes to governance models can carry significant financial risk.

Any potential changes to the Library's governance structure will require a thorough evaluation of the Public Libraries Act to comprehensively understand the potential legislative and financial risks.



There are opportunities to realize increased operating efficiencies through expanding shared services delivery

Shared services agreements with the City of Brampton exist for IT infrastructure, facilities management and maintenance, and security services. There may be opportunities to expand these to include some other IT services as well as Legal and Strategic Communications.



Additional efficiencies could be found through adopting the City's corporate technology applications

There are opportunities to adopt existing City technology solutions for back-office functions in order to reduce costs and maintain a consistent technology environment with the City.



The Library could use the City's technology to collect outstanding fines and late fees

There may be opportunities to use the City's point of sale technology to collect fines & late fees, allowing Library staff to focus on their core service delivery activities and achieve economies of scale.



Brampton Library's existing facilities are near capacity. If the Library aims to expand, a modernized Facilities Master Plan is required to guide that growth and development

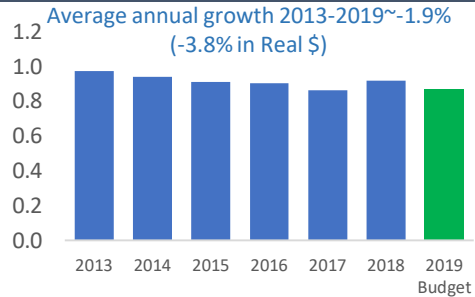
Developed in partnership with the City, an updated facilities master plan would guide the next stage of Library development in alignment with the City's overall recreation and community service strategy. This includes expanding opportunities to co-locate or share facility space should there be a desire to expand the Library's footprint in a cost effective manner.



Financial Overview of Brampton Libraries

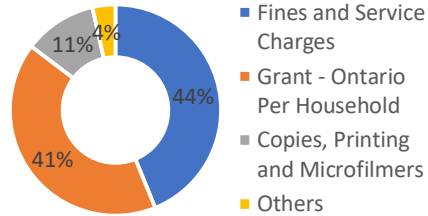
Key Financial Highlights – Based on 2019 Budget (Nominal \$ Millions)

Total Revenue*

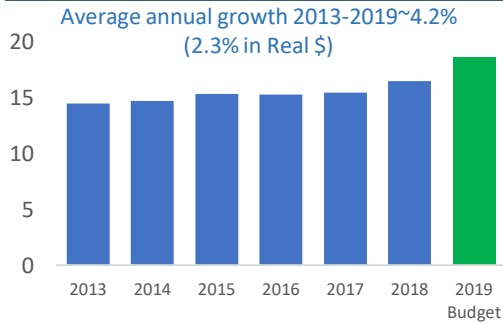


*excluding municipal contribution and surplus from previous years

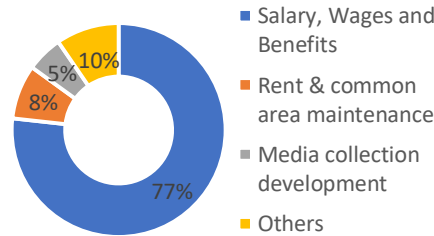
By Type*



Total Expenditure



By Type



Performance metrics

	2014	2015	2016	2017	2018	Avg annual growth
Total number of in-person visits per capita	3.8	3.6	3.4	2.9	3.3	-2.9%
Operating expenditure per capita (in real \$)	28.2	28.4	27.2	26.5	26.0	-3.0%

Net cost of Service*:

- Net costs for Library services are budgeted at \$17.7m for 2019 and have grown at an average annual rate of 4.6% since 2013 which includes opening three new branches and the 'On the Go Van'
- Cost drivers are complex and include the staff ratio necessary during opening hours, extent of opening hours, materials circulation, programming and attendance
- The City of Brampton provided a \$17.7m subsidy to the Library in budget 2019
- The Library has service level agreements with the City for IT hardware, facilities & security support, and leases space in City-owned facilities

Revenue:

- Revenues are budgeted at \$0.9m for 2019 and have decreased at an average annual rate of -1.9% since 2013, driven by decreases in fines and service charges, which are the largest source of revenue (44% of revenue in budget 2019) and fell at an average annual rate of -4.1% since 2013

Operating Expenditures:

- Expenditures are budgeted at \$18.5m for 2019 and have grown at an average annual rate of 4.2% since 2013
- Salaries, Wages and Benefits is the largest category of expenditure at 77% with an average annual growth of 6.2%

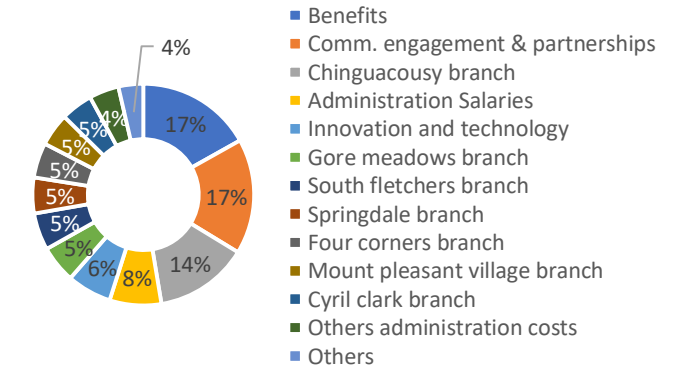
Performance Metrics:

- The total number of in-person visits per capita decreased between 2014 and 2018 at an average annual rate of -2.9%. This decrease is explained by consistent number of visits while population grew at 3.2%
- The decrease in 16/17 is explained by the closure of the Chinguacousy branch for 12 months for renovations, and the 2016 closure of the NE Interim site in preparation for the Springdale Branch, the opening of which was delayed

Positions

- 216 Staff
 - 93 Full-time staff
 - 123 part-time staff
- No new positions have been added in the budget 2019
- All shelver and most customer service agent positions are part-time positions

Total Expenditure by source



1. Benchmarking Assessment – Key Findings

By many measures, Brampton Library is fiscally effective compared to other jurisdictions, leading or being low average in per capita funding, cost per program attendee and circulation of both electronic and physical library materials. Additional key findings include:



Fiscal Effectiveness

Brampton’s expenditure per capita (\$29.84) is considerably lower than the CULC 2017 average of \$57.27. It also has lower municipal contributions to operating expenditures than comparable jurisdictions as well as a being below average on a cost per program attendee basis. That said, Brampton is above average on a cost per visit basis.



Library Space Per Capita

Brampton has the lowest square footage per capita (.32) and has fewer branches compared to similar or smaller jurisdictions. Further expanding programming offerings is significantly constrained by the lack of facilities space.



Programming & Attendance

Despite having fewer branches and less programming due to existing facility constraints, active cardholders among the population is only slightly below comparable systems. Programming attendance per active cardholders is also above or comparable to all jurisdictions evaluated within this review.



Highly Experienced Staff

Brampton Library branches offer a high standard of library service and resourcing with the second highest ratio of professional librarians per service point among comparable systems, highlighting the quality of service and technical expertise.



Technology

Brampton offers more computer workstations within its branches and has significantly higher usage rates of electronic databases compared to other jurisdictions, resulting in electronic circulation costs which are substantially lower than comparable municipalities.

Key Takeaways

- Library costs are driven by a number of factors including number and size of facilities, operating hours at each facility, staff to visitor ratios, material circulation, and number and type of programming offered
- Brampton Library has been able to deliver comparable services to similar sized municipalities despite operating with per capita funding levels that are measurably below comparators. While it has been financially efficient, its current model makes it difficult to expand traditional and programming services and volumes to meet growth
- Brampton Library does not charge for programming, while some other Library systems evaluated do for offerings such as STEM programming or robotics. While this could be an opportunity for revenue generation, the City’s Recreation department offers comparable programming for fees, raising the risk of cannibalizing existing revenues while potentially excluding those who cannot afford to pay
- Despite its facility constraints, Brampton Libraries has been able to foster active engagement of residents, with high attendance volumes per capita that exceed comparable jurisdictions
- Circulation costs for physical resources are also effective, sitting below the average of comparable municipalities

2. Organizational Structure & Governance – Key Findings

There are three organizational models that govern comparable library systems in Ontario.

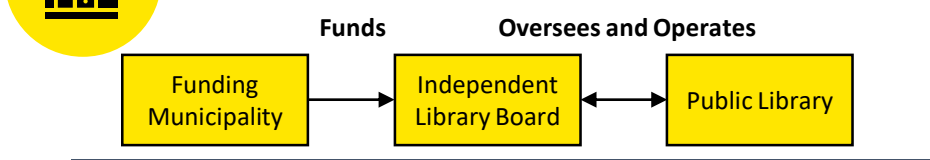
Roles & Responsibilities

Funding Municipality	Library Board
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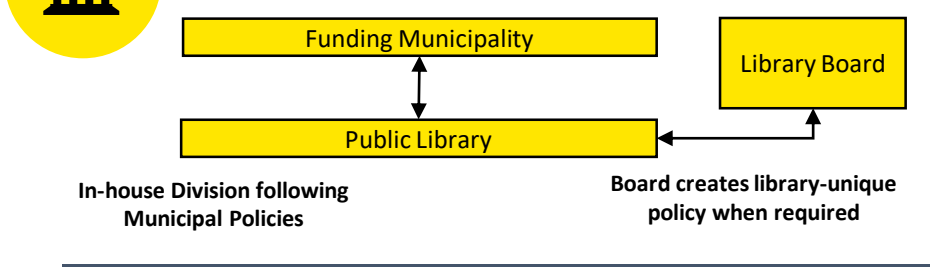
The Traditional Model is the model laid out in the Public Libraries Act and used by most public library systems in Ontario. The library system is operated under the management and oversight of the local library board. The library CEO reports to the Board, while the Board ultimately approves funding and operations.

- | | |
|--|---|
| <ul style="list-style-type: none"> Generally provides the bulk of the library's operating funding, and can provide services on behalf of the library under the terms of a negotiated and approved Service Level Agreement (SLA) | <ul style="list-style-type: none"> Can enter into SLAs to use municipal services for certain functions (ex. IT, Financial Admin), but must maintain control over its library operations Maintains a separate bank account and hires library staff |
|--|---|

Traditional Model



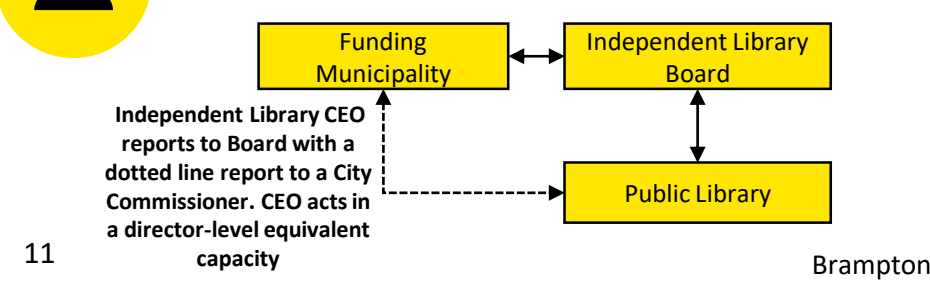
Internal Model



The Internal model incorporates the library system directly into the City. The library system (via Council motion) operates as a city division, with an adjoining board passing independent policy/practices as needed. Currently, only Mississauga uses this model which was created when written agreements were not provincially required.

- | | |
|--|--|
| <ul style="list-style-type: none"> Operates the library system as a city division, including managing all aspects of the employment relationship with staff All aspects of corporate and internal services, including employee relations, are managed by the city using city policy/practices The library CEO is a formal member of the city's administrative structure | <ul style="list-style-type: none"> Library board creates library-specific policies and practices as and when they are deemed to be necessary The board approves the ability for the Library CEO to be a formal member of the City administration |
|--|--|

Hybrid Model



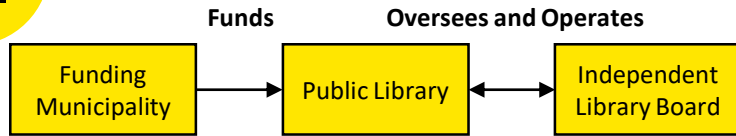
The hybrid model used by Markham Public Libraries has the Library CEO reporting directly both the Library Board as well as to the Commissioner of a City Division. Sitting in a director level-equivalent position while retaining arm's length as an employee of the board, the CEO and the Library have closer ties and working relationships to the municipality's divisions through SLAs/working agreements, while still retaining its autonomy.

- | | |
|---|--|
| <ul style="list-style-type: none"> Library CEO reports to a City Commissioner and has an expanded presence within City operations such as participating in director's fora Responsible for Library IT and some informal Finance/HR functions (with final approvals by Library) through an assigned and established point of contact | <ul style="list-style-type: none"> CEO /board maintains final authority over operations Staff are employees of the Library Library manages hiring, HR, benefits, procurement and most finance functions Library manages standalone facilities while co-located spaces are managed through SLAs with the City |
|---|--|

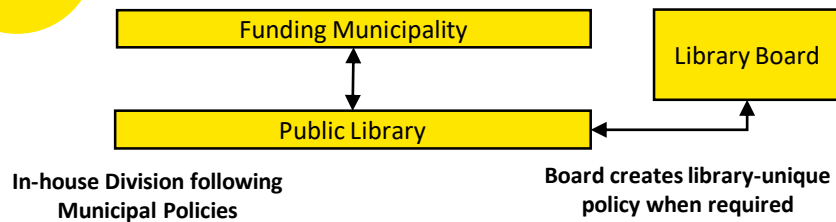
2. Organizational Structure & Governance – Key Findings (cont’d)

While there are three different organizational models, the majority of library systems in Ontario operate in the ‘traditional’ model, though many systems engage in some shared services practices. In addition, when contemplating each different model it is important to consider the following:

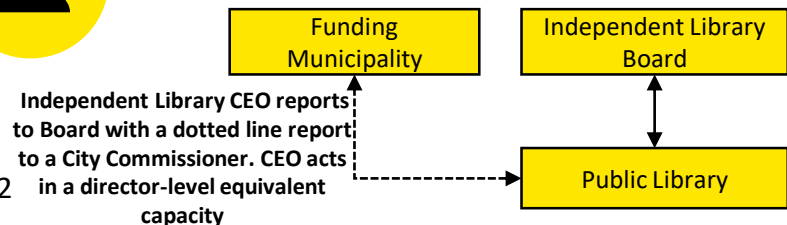
Traditional Model



Internal Model



Hybrid Model



Operating Model Considerations

The traditional model presents the following potential opportunities for finding efficiencies:

- Collaboration around programming, media and community partnerships, and facilities development and expansion with funding municipalities are common within these models
- Back office efficiencies, consolidations or partnerships can still occur through establishing Service Level Agreements between the City and Brampton Libraries. These opportunities are typically focused around IT, Facilities Management, and Security, with some scope for Finance and Legal services

Bringing library operations inhouse could present the following considerations:

- Written agreements between all parties, including potentially requiring legislative accent and/or approval by the Ministry of Tourism, Culture and Sport will be required to ensure any new governance model would continue to be in compliance with the PLA
- Any potential changes that do not comply with the PLA could face consequences such as the loss of access to provincial operating grants and capital funding.
 - The province has previously moved to enforce compliance with the PLA when the Windsor Library Board delegated Finance/IT responsibilities to the City, which the Ministry found to be a violation.
- Under this model there is a transfer of employees from one entity to another, raising the need to consider labour relations concerns regarding the employment status of Library employees

- Under a hybrid model, the CEO and the Library Board continue to retain autonomy over Library decisions, operating under distinct library policies and guidelines, but with expanded shared services support
- Defining reporting lines and responsibilities of the Library CEO relative to other City directors / commissioners and establishing consistent practices around this collaboration is critical
- Any expansion of shared services agreements must be done with the understanding that the City has sufficient capacity to meet Library needs and requirements (eg. seven day service for WiFi and client applications)

3. Process Improvement Opportunities – Key Findings

While Brampton is fiscally effective there are opportunities to improve in some areas, including the following process-related opportunities:



Shared Service SLAs

Brampton Library has effective SLAs in place for IT Hardware support and Facilities / Security support with the City. However, other jurisdictions reviewed have expanded their IT shared services to incorporate more municipal support for software and applications, as well as in some strategic communications, finance planning and legal functions.



Modularizing Facilities Planning

Municipalities identified have placed an emphasis on investing in facilities planning (new and existing spaces), reducing traditional shelving space in favour of open concept branch designs, programming areas and community meeting spaces. These actions are aligned with an ongoing shift in positioning libraries as community hubs, and are increasingly seeing them integrated into Community and Recreation centres.



Fee Payments

Other Library systems have leveraged City Point of Sale (POS) systems to manage the collection of fines. There is opportunity to generate savings by migrating from Brampton Library’s unique IT POS infrastructure into the City’s larger scaled and integrated systems.



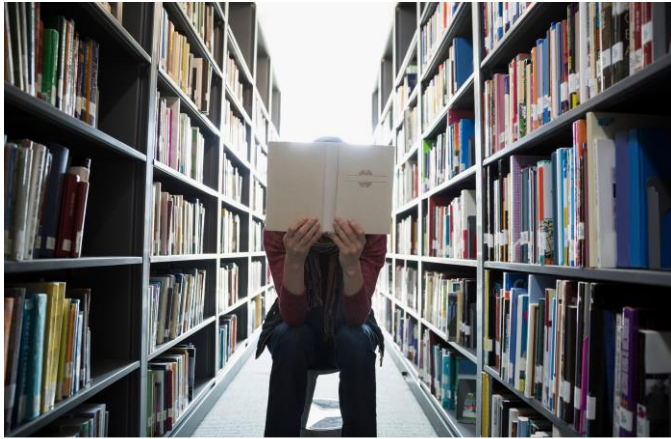
Ongoing Shift Towards Client-Centric Operations

Municipalities, including Brampton, have recognized rapidly changing consumer needs by embracing innovative technologies and practices. As a result, Librarian roles have shifted from being keyholders to information towards community partners and programming facilitators.

Key Takeaways

- The Library should investigate the opportunity to leverage Service Brampton to manage fee collections on behalf of libraries through an integrated POS system to reduce processing fees
- Brampton’s programming rivals leading municipalities but facility space has limited growth. Moving forward with a Facilities Master Plan is critical to meeting the future needs of the community
- There may be continued opportunities to invest in staff training and development related to technology services, customer service and LEAN process improvement to cater to diversifying client needs
- The City also partners with the Library on community engagement and communications activities, and provides access to vendor of record, bulk purchasing and other contracts

Conclusion



Points of Emphasis



Changing customer needs for library services require a change in how library facilities and services are designed and delivered



A Facilities Master Plan developed in close collaboration with the City of Brampton



Efficiencies can be gained by using more existing City technologies and shared service agreements

“ Brampton Library operates efficiently and effectively compared to jurisdictions reviewed in Ontario and across Canada, delivering a combination of traditional library services, programming and community supports to a broad spectrum of the community ”

The Library and City departments have close relationships across a number of functions including working collaboratively together on community engagement and outreach, referring program attendees to each others programs, sharing facilities, and working effectively in shared services agreements on IT, facilities management and security. Demand for Library services has been changing over the past five years; in-person attendance has stayed relatively flat on a per capita basis, but program attendance is strong, demand for study spaces is lively, and the usage of online materials has been increasing. A key future need for the Library is to develop a new Facilities Master Plan to provide a vision for the continued expansion of the Library to meet Brampton’s growing need. This Master Plan will need to be developed in close collaboration with the City, not only because the City is the Library’s primary funder, but also because there is a growing expectation that new Library facilities be developed as part of a broader community space with recreation and other services.

There are opportunities for the Brampton Library to realize minor additional efficiencies through leveraging, when possible, corporate IT applications that the City already employs, using the City’s point of sale technology for Library fines and fees payments, and to expand the use of City contract rates in media and advertising purchasing. There is also some potential to expand the use of shared services in IT and Legal services under the existing organizational model, though there are barriers to be overcome in realizing those savings and detailed service level agreements that would need to be worked out. Lastly, an alternative organizational model could be explored by the City which may have the potential to generate meaningful savings; however, there are significant risks associated with making broad structural changes to the existing Library and Library Board model including risks to the grant funding currently provided by the Province which could negate a large portion of the potential benefit.

Opportunities

Overview of Opportunities

The opportunities presented represent a combination of opportunities that could have a potential impact on the 2020 budget process, and those which have a longer timeline to realize benefits but could potentially be launched in 2020. The analysis presented subsequently includes detailed opportunity descriptions, implementation considerations, risks, and projected implementation costs. Additional analysis may be required to further refine and validate the viable scope of some opportunities. Any additional areas are identified within the detailed opportunity considerations in the subsequent section. These opportunities identified for Brampton Libraries are:

1. Employing an alternate governance model for Brampton Library – alternative organizational models for Library services exist in municipalities such as Mississauga and Markham, and there may be an opportunity to employ one of those models to reduce administrative expenditures. However, there are significant risks associated with moving towards these models including the risk of losing provincial operating grants for the Library, losing access to provincial capital funding for Library expansion, and risks associated with organizational disruption.
2. Expanding shared services agreements – if the risk is deemed too significant to employing an alternative service model, there may still be opportunities to expand the use of shared services agreements with the City for services such as Finance, IT and Legal. This would necessitate negotiating detailed service level agreements between the Board and the City, and may have organizational and labour relations implications.
3. Modernizing Library fee payments – the Library is in the process of looking for a new fine and fee payment processing technology. They should look to come to an agreement with the City of Brampton and Service Brampton to leverage the City's existing system.
4. Expand usage of the City's Existing Contracts and IT Ecosystem– the Library should, wherever possible, use the City's existing contractual/licensing agreements, bulk-buy practices, and vendor of record agreements to reduce procurement-related and back office-related expenditures. The Library should also look to use the City's technology to minimize costs and create a common IT application landscape.
5. Develop a new Facilities Master Plan – Brampton Library requires a new Facilities Master Plan to guide the next phase of growth and expansion across the municipality. The plan should actively be aligned with the City of Brampton's recreation and community facilities plans and should look to leverage co-location opportunities wherever possible.

1. Alternative Governance Model For Brampton Libraries



Understanding the Landscape

The Public Library Act (PLA) in Ontario requires municipal libraries to be managed by a local library board in order to qualify for ministerial grants (Brampton received \$358,000 in 2018), provincial capital funding and enrollment in provincially-funded programs. The PLA also mandates each system having a CEO that reports to the library board. However, **there are opportunities for variations in governance structure within the interpretation of the legislation as per the Ministry of Tourism, Culture and Sport.** Brampton Libraries currently operates as an independent entity governed by the local library board, with a CEO and five directors managing 216 employees. **Mississauga employs an alternative model with the Library run as a City Division within Community Services, a model they adopted in 1995 with a motion from Council and the assent of both the Mississauga Library Board and the Province.**

Opportunity	Expected Benefits
<ul style="list-style-type: none"> • There may be an opportunity to incorporate the Brampton Library as a City division, with the CEO reporting directly to a Commissioner and Library staff becoming City employees • Bringing the Library into the City as a division may create redundancies and allow for some existing non-union positions to have their responsibilities integrated into the portfolios of the corresponding City department director counterpart or reclassified into a middle management role reporting into a City department. • It is important to note that this opportunity comes with a significant degree of uncertainty and risk, including the need to get Provincial and Council assent and risks around future access to the Provincial Libraries Operating Grant (PLOG) in addition to other operating and capital grants that the Library may be eligible for or accessing in a given year. 	<ul style="list-style-type: none"> • Transition or elimination of senior non-union roles into the City of Brampton could generate annual labour savings and cost avoidance • Intangible Benefits Include: <ul style="list-style-type: none"> • Leveraging existing City knowledge and technical expertise • Economies of scale from City operations • Consolidation of IT landscape

Cumulative Budget Impact Range	Impact Type	Timeline to Realize Benefits
(\$1.16M) - \$1.61M	Cost savings / avoidance Efficiency gain	2021+

1. Alternative Governance Model For Brampton Libraries (cont'd)



Implementation Activities and Considerations

Implementing an alternative service model for Brampton Libraries requires:

- Legislative review of the viability of potential governance service models
- Work with Library board to develop new SLAs, specifying the responsibilities of both the City and the Board
- Transition identified staff responsibilities from Libraries to City
- Capacity within the City's existing shared services functions to absorb some of the responsibilities of existing Library resources; realizing savings is highly dependent on the City's existing capacity to absorb substantial portions of the workload of existing Library staff, particularly at the management level

Implementation risks and considerations:

- The Brampton Library Board would need to approve a governance model change
- Transition costs (ex. severance pay) of consolidating selected Library operations into existing City of Brampton departments; current costs are estimates only
- Municipalities can make governance changes without provincial approval as it is not a provincially mandated service. However, any action that interferes with the Library Board's authority to control library operations could result in potential financial/programming barriers (ex. Ministry withholding grant funding/access to provincially-funding programs and potential capital funding for future expansion). This could be mitigated by working with the Ministry during the development of a new governance structure to ensure it continues to meet the funding requirements of the PLA.
- **The City of Lincoln's Library Governance Review, in conversations with officials found systems that operate as City departments have a harder time attracting and retaining CEOs and senior staff**
- Labour relations impact between the classifications, legislative and regulative responsibilities between City and Library employees
- Current considerations are done based on the present-day interpretations of the Public Library Act and further legal opinion will be required.
- There may be changes to the Library's charitable status if operations reside as a City division which are likely to impact the ability of the Library system to raise funds through the Fund Development Officer position

Implementation Timeline

Activity	2020	2021	2022
Develop requirements and policy framework for potential new governance structure			
Obtain legal opinion of the proposed governance structure against the requirements of the Public Libraries Act			
Refine and design formal alternative operating model, governance framework and evaluate potential transition and one-time costs			
Gather input and consultation with relevant stakeholders (ex. Board, City Divisions, Council) and Provincial assent if required to assist the transition, including the steps require to ensure its compliance with the PLA			
Implement new governance structure and staffing changes			



1. Alternative Governance Model For Brampton Libraries (cont'd)

Jurisdictional Evidence

1. Mississauga is the only prominent system with a governance structure that has direct ties to the City. A council motion dictated the Mississauga Library System follow the City of Mississauga's policies and practices, with the exception of cases where the library board found a unique policy practice was required. This was viewed legislatively as allowing the board to continue to have control and management of library policy and operations. However, the governance change occurred in 1995 when the PLA did not require signed service level agreements. Staff hired by the library are hired as City employees and managed by the City's HR staff abiding by City policy and practices. As a municipal division, the Library itself is unable to provide tax receipts to potential donors. To offset the loss of its charitable status, an external volunteer-led registered charity corporation registered with the City of Mississauga manage the library's fundraising campaigns on its behalf.
2. **Markham Public Libraries operates within the City's Community and Fire Services department with the CEO reporting to the Commissioner of Community and Fire Services. However, the CEO also remains administratively accountable to an independent library board, who dictates strategic direction, maintains governance and oversight of Library operations.** The CEO is a Board Employee in which the board delegates the responsibility to supervise and lead the direction of the library

Budget Impact Range 2020-2024

	2020	2021	2022	2023	2024	2020-2024
Savings	\$0	\$159,000 - 479,000	\$159,000 - 479,000	\$159,000 - 479,000	\$159,000 - 479,000	\$636,000 - 1,916,000
Implementation costs	\$0	\$169,000 - 929,000	\$0 - 360,000	\$0 - 360,000	\$0 - 360,000	\$169,000 - 2,009,000
Net budgetary impact range	\$0	\$(557,000) - 171,000	\$(201,000) - 479,000	\$(201,000) - 479,000	\$(201,000) - 479,000	\$(1,160,000) - 1,608,000

Budget Impact Assessment:

Implementation costs currently include the loss of the roughly \$360,000 per year of the Provincial Library Operating Grant (PLOG). Brampton Library also receives additional operating and capital grant funding through specific programs or projects which have not been factored. These additional grants from the Province would also be at risk in this scenario.

1. Alternative Governance Model For Brampton Libraries – Methodology, Data Inputs and Calculation Details

Methodology:

- Average Salaries and benefits for non-union position(s) have been calculated. The range of 1 to 3 positions removed represent the potential spectrum of cost savings for the City
- Severance costs estimates have been calculated for the positions identified
- Transition costs estimates have been estimated
- The potential loss of the provincial contribution has been factored in to the calculations as a risk. Other provincial grants, either operating or capital, have not been factored in as they are variable and by application. However, it is important to note that they would also potentially be put at risk under this scenario

Calculation details

Spend	Low range of efficiencies	Mid range of efficiencies	High range of efficiencies
Savings	\$159,000	\$319,000	\$479,000
Implementation costs			
Total Implementation costs	\$169,000 - 716,000	\$239,000 - 823,000	\$308,000 - 929,000
Net budgetary impact range	\$(557,00) – (10,000)	\$(504,00) – 80,000	\$(450,00) – 171,000

Assumptions:

- For severance costs the severance policies applicable to City positions have been used, and a range of 5-10 years of service has been used to calculate severance costs.
- Transition costs have been estimated between \$100k and \$250k
- Provincial grant funding is at risk in this scenario and therefore has been considered as a potential cost
- Each scenario assumes that work can be reallocated within existing non-union resources to find efficiencies; a scenario in which work can be reallocated from two or three non-union positions without adding additional resources is likely to be highly challenging to realize

Data Inputs	Source
Detailed salaries and benefits per position budget 2019	File “2019 Staffing Budget by Department with Benefits-5-13-2019”
Severance policy Brampton	File “2017 07 19 Termination Provision Final”

2. Expanding Shared Services Agreements



Understanding the Landscape

As a separate entity from the City of Brampton, Brampton Libraries operate largely at arm’s length with distinct back office entities and systems. The library maintains some shared services agreements and information sharing with the City in the areas of Facility Maintenance, Legal, Real Estate and Purchasing. There is opportunity to realize additional efficiencies, cost savings or strategic alignment if the Library continues to leverage more of the City’s existing organizational capabilities and scale through new shared services agreements. This finding builds on the initial findings of the 2017 Brampton Internal Audit Report, which recommended library management work with City leadership to identify current library activities that could be potentially transitioned within the City.

Opportunity

- Brampton Libraries should continue to look at new opportunities to leverage shared services at the City of Brampton. Areas identified in the 2017 Internal Audit Report included mobility service, printing, facilities space etc.
- Update the 2018 IT MOU to expand the scope of common shared IT services between the Libraries and the City of Brampton can further optimize the workforce and reduce duplication of tasks. For example, Brampton Libraries could take advantage of the City’s productivity software licensing agreements and support, reducing reliance on open source suites such as Google Drive, Calendars and Gmail
- Leverage the City’s capital planning, infrastructure and financial expertise as part of the development process for a new facilities master plan

Expected Benefits

- Operating savings through eliminating noticeable duplication of functions such as Legal services
- Brampton Libraries can gain the expertise, advice and support of City staff and resources, while continuing to retain its unique understanding of its own business requirements through service level agreements
- The library can generate efficiencies from the City’s economies of scale through bundling, administrative streamlining of staff resources, and utilizing the City’s subject matter experts for contract management, compliance and specification development

Cumulative Budget Impact Range	Impact Type	Timeline to Realize Benefits
(\$1.04M) - \$1.10M	Cost savings / avoidance Efficiency gain	2021+

2. Expanding Shared Services Agreements (cont'd)



Implementation Activities and Considerations

The City, in conjunction with Brampton Libraries should review existing Service Level Agreements to evaluate additional opportunities for shared services partnership opportunities related to IT and Legal services, and potentially some Finance services. Note that this opportunity is mutually exclusive hypothesis with (1. Alternative Service Model For Brampton Libraries)

Considerations include:

- There are still likely to be areas in which the Library will require significant autonomy and flexibility in its operations (ex. Collections procurement and specialized materials could be time sensitive compared to City purchasing policies; Library-specific applications are required as a core services)
- Transition costs resulting from changes to staff compliment, roles and responsibilities
- It will be important to determine the appropriate segregation of duties, span of control and potential new responsibilities within Library staff portfolios under any potential change
- Any expanded delegation of services or operations would require a new dedicated SLA or an expansion of an existing agreement
- Key considerations for Library SLAs are that client-facing technology and applications (WiFi, e-services) require support 7 days a week at extended hours beyond the City's normal operations; it will be critical to meet and maintain these service levels to realize efficiencies
- Under the Public Libraries Act, the board retains control over library operations and has the unilateral authority to cancel SLA agreements with the City at any time. Ongoing board dialogue and their commitment to continue SLAs annually will be required
- Labour relations impact between the classifications, legislative and regulative responsibilities between City and Library employees
- Municipalities can deliver shared services on behalf of the Library Board. However, the Board must approve and agree to the proposed SLA. The Province has, in the past, demonstrated that they are willing to remove grant funding from Libraries if they believe that the Board's independence is being compromised. That risk may be mitigated through discussions with the Province.

Implementation Timeline

Activity	2020	2021	2022
Evaluate the scope of potential partnerships between the City and the Library			
Review of existing City responsibilities and capacity to absorb identified Library functions, including transition costs and labor impacts			
Engage labor groups, City representatives, Library Board during the development of Shared Service Agreements. Conduct risk management and prepare implementation plan. Engage the Province if required.			
Design shared services structure, operating model, policy framework for approval			
Implement system/technology enhances to support shared services delivery across Library and City providers			
Launch consolidation of identified libraries services with City			

2. Expanding Shared Services Agreements (cont'd)



Jurisdictional Evidence

1. Mississauga Libraries has a dedicated shared services team that handles a broad spectrum of services including promotion, community development, web services, systems administration as well as the acquisition and processing of new materials. The City also works with the divisions within the City's Community Services Department (Ex. Recreation, parks, culture, fire and emergency) and other City areas such as HR, IT, Facilities Management, Legal, Finance and Communications as support in the delivery of library services.
2. As part of a previous service efficiency review, Markham Public Library transferred its in-house IT department (consisting of 2.5 FTEs) to the City. As a result, the City assists the Library with its technology needs and handles procurement requests. The process is regulated through a service level agreement signed between Markham IT and the Library, renewed annually.

Budget Impact Range 2020-2024

	2020	2021	2022	2023	2024	2020-2024
Savings	\$0	\$133,000 - 309,000	\$133,000 - 309,000	\$133,000 - 309,000	\$133,000 - 309,000	\$532,000-1,236,000
Implementation costs	\$0	\$50,000-619,000	\$0-360,000	\$0-360,000	\$0-360,000	\$50,000-1,699,000
Net budgetary impact range	\$0	\$(360)-173,000	\$(227)-309,000	\$(227)-309,000	\$(227)-309,000	\$(1,041,000)-1,100,000

Budget Impact Assessment:

Implementation costs currently include the loss of the roughly \$360,000 per year of the Provincial Library Operating Grant (PLOG). Brampton Library also receives additional operating and capital grant funding through specific programs or projects which have not been factored. These additional grants from the Province would also be at risk in this scenario.

2. Expanding Shared Services Agreements – Methodology, Data Inputs and Calculation Details

Methodology:

- Average Salaries and benefits for 1-2 non-union positions have been calculated, and represents the potential cost savings for the City
- Legal contract services represent the second part of cost savings for the City. Year-to-date 2019 actuals have been used instead of budget 2019 numbers as they significantly exceed budget estimates
- Severance costs estimates have been calculated for one manager-level position and one assistant-level position
- Transition costs estimates have been applied
- The potential loss of the provincial contribution has been factored in to the calculations as a risk. Other provincial grants, either operating or capital, have not been factored in as they are variable and by application. However, it is important to note that they would also potentially be put at risk under this scenario

Calculation details

Spend	Time savings: 25%	Time savings: 50%	Time savings: 100%
% of salaries and benefits of the positions	\$58,000	\$117,000	\$234,000
Legal contracted services	\$75,000	\$75,000	\$75,000
Savings	\$133,000	\$192,000	\$309,000
Implementation costs			
Total Implementation costs	\$50,000 - 485,000	\$93,000 - 552,000	\$136,000 - 619,000
Net budgetary impact range	\$ (352,000) - \$83,000	\$ (360,000) - \$99,000	\$ (310,000) - \$173,000

Assumptions:

- For severance costs the severance policies applicable to City positions have been used, and a range of 5-10 years of service has been used to calculate severance costs.
- The contracted legal services could be internalized into legal services without extra cost for the City
- Transition costs have been estimated between \$50 and \$125k
- Given the Province has previously indicated their willingness to restrict access to grant funding based on shared services expansions (City of Windsor & Windsor Public Library in 2017) there is a risk that they could do the same in this case; the risk is likely lower related to IT, but may be higher related to Finance.

Data Inputs	Source
Detailed salaries and benefits per position budget 2019	File "2019 Staffing Budget by Department with Benefits-5-13-2019"
Severance policy Brampton	File "2017 07 19 Termination Provision Final"
Legal contracted services budget 2019	File "Operating by year"
Legal contracted services Actuals YTD 2019	File "Operating 2013-2019"

3. Modernizing fee payment at Libraries



Understanding the Landscape

Users of Brampton Public Library (BPL) need to pay fines in person at any of the library locations, using cash, cheques or debit cards. BPL does not have an online payment system which would enable users to pay their dues/fees from home. For debit card payments, the City uses its own IT infrastructure to collect and process payments from residents (e.g. fines). In order to process payments made electronically, BPL must ensure its payment systems meet the technical and operational standards mandated by PCI (payment card industry) compliance regulations. This requires significant investments in IT infrastructure and its associated capital, operating, and licensing costs

Opportunity

The Library may choose to integrate the feature of fine payment with the existing online payment features for parking, property tax, etc. at the City. This would reduce the administrative effort associated with handling and managing cash transactions, and would also increase convenience for residents. By leveraging the City's existing payment infrastructure, BPL can avoid the duplicative costs for associated IT investments and PCI compliance

Expected Benefits

- Elimination of duplicative costs for IT infrastructure to support payments
- Elimination of duplicative costs for PCI compliance
- Reduced administrative effort for library staff to manage payments

Cumulative Budget Impact Range	Impact Type	Timeline to Realize Benefits
\$30k - \$35k	Cost savings / avoidance	2021

3. Modernizing fee payment at Libraries (cont'd)



Implementation Activities and Considerations

Modernization of fee payment at Brampton libraries requires:

- Liaison between the City, Library Board, and Council to approve the integration of fine/fee payment for libraries with the rest of the City
- Application design, development, testing, and roll out for online fee payment
- Planning and execution for phase-out of the Brampton Public Library’s existing payment infrastructure

Considerations include:

- Agreement between the Library Board and the City would be critical to allow the integration of library fine/fee payment with the rest of the City’s online payment streams
- Training would be needed for library staff to acquaint them with the new payment mechanism
- Marketing and communication efforts would be required to appraise the residents of Brampton about the changes to payment features (online payment)
- Legislative constraints that prohibit the integration of payments between two separate entities, if any, may need to be amended

Implementation Timeline

Activity	2020	2021	2022
Confirm the scope of potential partnership between the Library and the City (ex. Service Brampton)			
Obtain department and library feedback on technology needs and transition requirements			
Determine scope of partnership through the development of a draft SLA agreement, risk management and defining governance			
Obtain approval from relevant parties (ex. Library Board, Department Commissioners) and signed SLA agreement			
Launch initial phases of POS integration with City infrastructure, staff training with new systems			
Refine initial launch and continue phased implementation, review/refine implementation strategy when necessary			

3. Modernizing fee payment at Libraries (cont'd)



Jurisdictional Evidence

Many libraries across Ontario, from large ones like Toronto Public Library, to smaller ones such as the public libraries at Kitchener and Whitby have implemented the online fine/fee payment facility for its users.

Markham Public Libraries leverage the City's POS and online systems to manage its fine payments and programming registrations. Residents are able to pay their outstanding fines online if dues reach a certain threshold.

Budget Impact Range 2020-2024

	2020	2021	2022	2023	2024	2020-2024
Savings	\$0	\$10,000	\$10,000	\$10,000	\$10,000	\$40,000
Implementation costs	\$0	\$5,000-10,000	\$0	\$0	\$0	\$5,000-10,000
Net budgetary impact range	\$0	\$0 – 5,000	\$10,000	\$10,000	\$10,000	\$30,000-35,000

3. Modernizing fee payment at Libraries – Methodology, Data Inputs and Calculation Details

Methodology:

- Fees paid by the Library for received payments have been isolated, and represent the cost savings for the City
- Implementation costs have been estimated

Calculation details

Spend	
Fees on received payments	\$10,000
Savings	\$10,000
Implementation costs	
Infrastructure	\$5,000 – 10,000
Total Implementation costs	\$5,000 – 10,000
Net budgetary impact range	\$0 – 5,000

Assumptions:

- Fees paid on received payments could be fully avoided by using the City’s infrastructure
- Implementation costs are estimated between \$5,000 and \$10,000 to implement the City’s existing POS technology at eight Library branches

Data Inputs	Source
Fees on received payments 2018	File “Operating 2013-2019”

4. Expand usage of the City’s Existing Contracts and IT Ecosystem



Understanding the Landscape

Brampton Library is an independent organization which is largely responsible for its own procurement, IT and communications. However, it is a relatively small organization and may not be able to drive effective economies of scale in its procurement of IT assets, media and advertising, professional services, and other key areas. The potential addressable spend in IT services, advertising and community relations, payroll, human resources, and furniture and supplies was \$1.13M in 2018.

Brampton Library currently uses some of the City’s procurement agreements (for example, for some of their IT hardware contracts). The Library also has an existing agency contract for the provision of graphic design, printing and marketing services, valued at approx. \$158K in 2018. IT application and product network is divided into two categories: corporate applications and public applications. Corporate applications are largely off the shelf products for day-to-day use such as Microsoft and Google applications, human resources and accounting systems.

Opportunity	Expected Benefits
<p>There is an opportunity for Brampton Library to leverage the City of Brampton’s procurement rates and agreements, including Vendor of Record agreements, media and advertising rates and contracts, and existing or new IT acquisitions. Leveraging the City’s existing contracts and consolidating procurements for common equipment and supplies could result in meaningful savings.</p> <p>The Brampton Library already uses the City’s underlying physical IT infrastructure. Leveraging the City’s existing IT back-office applications is a logical next step.</p> <p>As the Library’s existing corporate back-office application contracts come to an end, the Library should look to use the City’s technology to minimize costs and create a common IT application landscape.</p> <p>Lastly, the Library can also leverage the expertise and resources of Strategic Communications for the provision of graphic design and promotions projects, reducing the need for external contract costs, while bringing better alignment with City messaging and branding</p>	<p>Expected benefits include:</p> <ul style="list-style-type: none"> • Operating savings of between from IT contracts/media contracts • Leveraging the existing contracts and licences already in place at the City of Brampton with little additional cost while avoiding overlapping systems • Reduced reliance on external agency contracts in favour of Strategic Communications absorbing Library graphic and promotions requests. Taking on the Library portfolio can allow Strategic Communications better insight in Library project needs and oversight in managing stronger brand synergies with the City of Brampton

Cumulative Budget Impact Range	Impact Type	Timeline to Realize Benefits
\$276k – \$557k	Cost savings / avoidance	2020+

4. Expand usage of the City’s Existing Contracts and IT Ecosystem (cont’d)



Implementation Activities and Considerations

Leveraging the City’s back-office technology applications for Brampton Libraries requires:

- Agreements with the City about the number and nature of licenses to acquire for the Library
- Existing service level agreements will need to be expanded to cover support for back-office applications
- The City’s technology will need to be assessed for its ability to meet the Library’s needs

Considerations include:

- Some Library-specific procurements may not be covered under existing agreements at the City of Brampton (for example, subscriptions to electronic library media); in these cases there may be little value in the City providing procurement support. This should be evaluated on a case-by-case basis.
- Customizations may be required to expand the use of some applications, for example for financial systems or time and attendance tracking. In these cases it will be important to assess the cost of customizations against the cost of the Library procuring their own solution to meet those needs.
- Whether any switch to the City of Brampton’s enterprise solutions will effect the Library’s existing Google Enterprise platform and subsequent discounts for selected services
- Timeline to realize benefits may be highly dependent on when existing IT or media contracts the Library has signed expire
- Opportunities to leverage Strategic Communications were identified as part of a 2017 Internal Audit. At that time Strategic Communications did not have the capacity to support the Library Board’s needs. Strategic Communications capacity will need to be re-evaluated in order to realize this opportunity.

Implementation Timeline

Activity	2020	2021	2022
Confirm scope of potential areas of City contracts and IT areas where Library can leverage, including status of existing Library contracts			
Confirm internal support at the City of Brampton to absorb responsibilities.			
Develop governance model and operating agreements for contracts. Consultation with relevant stakeholders			
Determine implementation roadmap for contract transfer and receive approval from Library Board			
Transition identified Library services through operating agreements to the City			
Refine agreements as necessary			

4. Expand usage of the City’s Existing Contracts and IT Ecosystem (cont’d)



Jurisdictional Evidence

Brampton Library currently manages its own procurement but takes advantage of the City’s procurement agreements for advertising and community relations, furniture payments, and other contracts, including its VOR list, buyer’s list and bulk discounts.

Mississauga Library leverages the City’s procurement contracts.

Markham Public Libraries manages its own procurement but takes advantage of the City’s economies of scale, including its VOR, buyer’s list and bulk discounts and uses Markham’s existing IT environment.

Budget Impact Range 2020-2024

	2020	2021	2022	2023	2024	2020-2024
Savings	\$16,000 – 33,000	\$65,000 - 131,000	\$65,000 - 131,000	\$65,000 - 131,000	\$65,000 - 131,000	\$276,000 - 557,000
Implementation costs	\$0	\$0	\$0	\$0	\$0	\$0
Net budgetary impact range	\$16,000 – 33,000	\$65,000- \$131,000	\$65,000- \$131,000	\$65,000- \$131,000	\$65,000- \$131,000	\$276,000 - 557,000

4. Expand usage of the City’s Existing Contracts and IT Ecosystem – Methodology, Data Inputs and Calculation Details

Methodology:

- Graphic Design contracts costs have been isolated, and a range of 50%-100% has been applied to calculate cost savings based on an assumption that Strategic Communications could take on significant portions of the work with their existing resources
- IT contracts costs have been isolated, and a range of 15%-30% has been applied to calculate cost savings; this reflects a combination of expected savings through leveraging the City’s existing contracts and taking on existing City corporate applications, the costs of which are anticipated to be low due to the City’s existing licensing agreements

Calculation details

Spend	
Total IT Contract costs	\$340,000
Savings (15-30%)	\$51,000 - 102,000
Total Graphic design work	\$28,000
Savings (50-100%)	\$14,000 – 28,000
Total advertising in Brampton Guardian, Bramptonist, and InBrampton	\$3,000
Savings (15-30%)	\$450 – 900
Net budgetary impact range	\$65,000 - \$131,000

Assumptions:

- Assumes the City’s Strategy Communications function can take on Graphic Design services with existing internal resources. Note that in 2017 the Strategic Communications function was asked to take on this role and did not have capacity to do so
- Assumes that by working with the City preferential rates can be applied for advertising in the *Brampton Guardian, Bramptonist, and InBrampton*
- Cost savings on the IT contracts have been estimated between 15% and 30%; this reflects a combination of expected savings through leveraging the City’s existing contracts and taking on existing City corporate applications, the costs of which are anticipated to be low due to the City’s existing licensing agreements

Data Inputs	Source
IT Contracts costs 2018	File “Operating 2013-2019”
Graphic design costs 2018	File “Operating 2013-2019”
Advertising costs (Brampton Guardian, Bramptonist, and InBrampton)	File “Operating 2013-2019”

5. Develop a New Facilities Master Plan



Understanding the Landscape

The most recent Brampton Library Facilities Plan was completed in 2011, under a previous leadership team, library board and council term. Since that time, the primary recommended facility development strategy has been largely complete with the development of a new Central Library the most prominent outstanding item. With the Facilities Master Plan largely complete, there is an immediate need for a refreshed plan that can 1) align with the goals set in the 2017-2021 Strategic Plan and beyond, 2) act as a blueprint and design principle for future facilities planning, and 3) be a tool to guide capital funding demands of the Library going forward in conjunction with the City of Brampton. A plan that is designed in collaboration with Library Board, leadership and relevant stakeholders such as clients, community partners, and the City of Brampton presents a crucial foundational pillar to address the primary need for increased facility space. Consideration will also have to account for aligning the Library’s goals with those of the City, its primary funder as well as those of departments that have similar goals as the Library (ex. Recreation).

Brampton’s Parks and Recreation department currently has an integrated master plan independent of the Library’s master plan (last updated: 2017) that guides investments over the next 15 years. The report encompasses planning and provision of facilities and programming that take place within them. As some Brampton library branches are already co-located in recreation facilities, there is a case for Libraries, Parks and Recreation to work more collaborative to co-design facilities planning for future iterations.

Opportunity

Having an updated Facilities Master Plan in alignment with City priorities is crucial in advancing the future goals of Brampton Libraries. The new plan will entrench the future facility needs of the library, identify relevant renovations necessary for existing branches and articulate the library’s direction regarding facility design, service offerings and operating model in the future, continuing the progress made in the previous iteration.

Leading jurisdictions that have integrated facilities plans have had the Public Library take a leading role in its Facilities Planning. A key advantage has been leveraging the diverse network of community partners that are aligned with Library system to generate insights and gauge resident needs for new City recreation, parks and library facilities. With the ongoing focus on developing co-location advocated by both Brampton and neighboring municipalities, adopting an integrated plan with City divisions presents an opportunity to align needs, pool funding and resources, address service gaps and eliminate overlaps that currently exist.

Expected Benefits

Updating the Facilities Master Plan can achieve the following results:

- Entrench library needs as it relates to future planning and budget requests
- Ability to advance Library needs with clarity to funders, council and community partners
- An established blueprint to prioritize areas/goals of need and a regimented strategy for implementation

Supplementing an Updated Facilities Master Plan with an integrated piece across multiple departments can generate the additional benefits:

- Stronger alignment/closer relationships with city divisions in facilities planning and programming development
- Better utilization of parks, recreation and library space that were otherwise underutilized on its own (ex. Chinguacousy Ski Park and Chalet)
- City divisions can access the community expertise and consultation of the Library’s extensive partnership network

Cumulative Budget Impact Range	Impact Type	Timeline to Realize Benefits
(\$100k) – (\$150k)	Productivity Improvement	2021+

5. Develop a New Facilities Master Plan (cont'd)



Implementation Activities and Considerations

Developing a new facilities master plan requires:

- Extensive resourcing requirements from all participating departments for phases of work that could include: research, jurisdictional review, demographic profiles, community engagement, internal/external workshops, council interviews, senior management facilitations, surveys, facilities review and analysis
- Buy-in from all identified parties to collaborative on needs assessment and a unified goal towards facilities management/design
- The development of guiding principles that inform the new facilities plan, goals that are aligned with departments, the City of Brampton and Public Libraries

Considerations include:

- Evaluation whether external resources or expertise could be leveraged to assist in the development of an integrated Facilities Master Plan. (Ex. Vaughan, Markham and Brampton had previously enlisted an external consultant on their plans)
- While there are no legislative barriers to an integrated Facilities Masters Plan, the Public Libraries' Act requirement remains that Library Boards are an independent body that follows the mandate set in the PLA (ex. Delivering accessible and equitable Library service)

Implementation Timeline

Activity	2020	2021	2022
Prioritize the update of the Facilities Master Plan into the agenda of the current Library Board year			
Liaise with Recreation and Parks departments to gauge interest and buy-in towards an integrated Facilities Master Plan			
Evaluate the resourcing requirements necessary for a standalone/integrated Facilities Master Plan, including the need to procure external expertise and advisory			
Community and stakeholder engagement			
Development of the Facilities Master Plan			
Ongoing review and refinement of plan goals and priorities in accordance to City and Library strategic objectives			

5. Develop a New Facilities Master Plan (cont'd)



Jurisdictional Evidence

Integrated Facilities Master Plan

Library systems in Vaughan and Markham have taken an integrated approach to facilities planning. Both municipalities in partnership with their respective City recreation and parks departments have jointly developed an integrated Facilities and Strategic Master Plan for its Parks, Recreation and Library facilities. In the City of Markham, Markham Public Libraries play a leading development in their integrated plan, aligning the Library's strategic priorities, facilities design and programming offerings with those of the City. Within the City of Vaughan, the Library has been able to advance its facilities needs through a closer partnership in capital funding and planning, including advocating for innovative partnerships with hospitals and recreation facilities to build new branches. Vaughan's integrated plan has also been effective at leveraging new transit infrastructure (ex. TTC Vaughan Extension) to emphasize creating transit-supportive facilities such as the new multi-purpose library facility near Vaughan Metropolitan Center station. The collaborative approach has advanced the facilities needs of the library with Markham opening three new branches in the last decade and Vaughan expanding its library square footage from 0.54 sq ft to 0.61 sq ft between 2013 to 2018, a 44% increase between their initial 2013 Master Plan and 2018 update.

Surrey Facilities Master Plan, A 20 Year Outlook

The Surrey Library Board has a 20 Year Facilities Plan that outlines the expansion of new branches, modernization of existing branches and potential mobile or alternative service delivery models for the system. The City has invested \$58M between 1994 and 2014 with the plan proposing an additional \$35.2M between 2014-2033. The plan also plans for changing technologies and transitioning libraries from its traditional facility role by designating frameworks regarding branch design, community partnerships within spaces, and characterising the interconnected roles of branch, community and the central library. The board has set upon 6 design principles for future facility space that is also in alignment with the goals of the City's Strategic Plan.

Budget Impact Range 2020-2024

	2020	2021	2022	2023	2024	2020-2024
Savings						\$0
Implementation costs	\$50,000 – 75,000	\$50,000 – 75,000	\$0	\$0	\$0	\$100,000 - 150,000
Net budgetary impact range	\$50,000 – 75,000	\$50,000 – 75,000	\$0	\$0	\$0	\$100,000 – 150,000

Budget Impact Assessment:

Note that this estimate does not include any assumptions around future capital investments which may be required as part of implementing the Facilities Master Plan.

5. Develop a New Facilities Master Plan – Methodology, Data Inputs and Calculation Details

Methodology:

- Professional services costs are assumed in order to support the Brampton Library in developing a new Facilities Master Plan

Calculation details

Expenditures	
Professional services costs	\$100,000 - \$150,000
Net budgetary impact range	\$100,000 - \$150,000

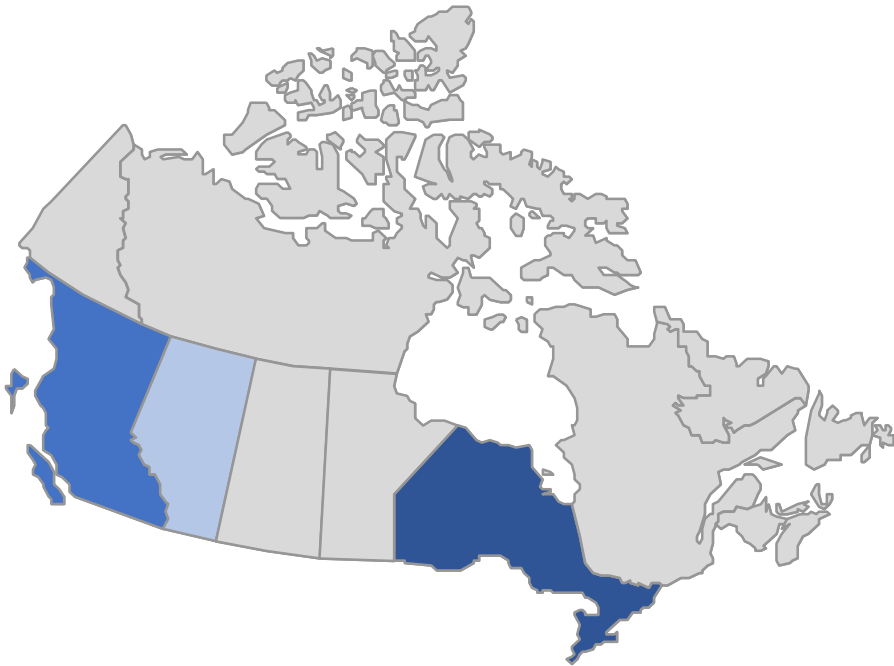
Assumptions:

- Professional services costs have been estimated at between \$100,000 and \$150,000

Data Inputs	Source
Professional services costs to support Facilities Master Plan Development	Management estimate

Jurisdictional Scan

Jurisdictional Scan Approach



The Approach

EY performed a jurisdictional scan with the intent of identifying leading practices and service delivery models through:



Primary & Secondary Source Review

Evaluated the performance of Brampton’s current service offerings, its service levels and library delivery model relative to comparable jurisdictions. The focus was on identifying where service gaps exist, innovative practices/service delivery models that could be employed to close them and areas where Brampton outperforms its comparators.



Local Jurisdictions

Most jurisdictions selected are in Southern Ontario as they are governed under the same legislative framework, have relatively common demographic characteristics, and are generally strong comparators to Brampton Library.



National Jurisdictions

Two national jurisdictions were also examined as they have common economic and demographic growth profiles to Brampton, and can offer lessons learned to the approach to serving rapidly expanding municipalities.

Jurisdictions Reviewed by EY

City of Markham: Markham is a diverse municipality and has a Library system that utilizes a hybrid model with a significant degree of shared services

City of Hamilton: Hamilton is comparably sized to Brampton as a municipality, and is a strong comparator as it has a highly unionized environment

City of Mississauga: Mississauga employs a very different Library governance model than Brampton and presents a potential alternative

City of Vaughan: Vaughan is a diverse municipality that has a comparable Library system model to Brampton

City of Surrey: Surrey is a diverse municipality with comparable demographics to Brampton though it is governed under different legislation

City of Calgary: Although Calgary is larger, its Library system expanded rapidly during the City’s recent growth phase and has a number of innovative practices, particularly around fundraising and the development of its central library

Jurisdictional Scan Priority Areas

- The Brampton Library Service Review focused on specific research parameters and focus areas for the jurisdictional analysis
 - Parameters include: size (population); demographics (diversity and age); economic growth rates; unionization rates; in addition to category specific parameters we identify such as # of dwellings.
 - Three central focus areas will guide the J-scan that will be applied to each jurisdiction (Financial Efficiencies, Governance, Technology), in addition to two category specific focus areas within the Libraries space

 <p>Financial Efficiencies</p>	 <p>Programming and Attendance</p>	 <p>Governance</p>	 <p>Facilities Space</p>	 <p>Library Materials and Usage</p>	 <p>Technology And Innovation</p>
<ul style="list-style-type: none"> • Performance improvement • Funding partnerships • Addressing funding pressures • Economic Impact Analysis 	<ul style="list-style-type: none"> • Programming Portfolio and Focus • Community Partnerships • Extended Library Services 	<ul style="list-style-type: none"> • Library Board Structure and Authority • Staffing • Spans layers 	<ul style="list-style-type: none"> • Facility Master Plan • Facility structure and design 	<ul style="list-style-type: none"> • Collections purchasing trends and practices • Outreach strategies • Circulation 	<ul style="list-style-type: none"> • Alternative service delivery • Digital Strategy • Innovative access to library service

Jurisdictional Scan Key Findings

Brampton Library is a fiscally efficient and effective system compared to jurisdictions identified and compared to the Canadian Urban Library's Council average



Financial Efficiencies Findings

1. Brampton's expenditure per capita (\$29.84), on Public Libraries is considerably lower than the 2017 CULC member average of \$57.27
 - a. Municipal contributions to Brampton Libraries operating expenditures are below average (as a percentage of total city expenditures) when compared to other jurisdictions
 - b. Cost per visit (\$8.89) is above the jurisdictional average (\$8.05), though cost per program attendee (\$127.61) is well below the jurisdictional average (\$170.93)
 - c. Circulation of both electronic materials (\$23.03) and physical materials (\$4.48) are below the jurisdictional average of (\$116.36) and (\$4.86) respectively
2. Finding efficiencies through integrating and expanding Shared Services
 - a. Mississauga has a dedicated Shared Services team that has responsibility for promotion, community development, web services and purchasing. The team also works with other divisions within Community Services and other City departments in the areas for HR, IT, facilities management, Legal, Finance, and Communications to deliver library services
 - b. Vaughan Libraries works with the City's Facilities Services and Infrastructure Delivery Departments in managing capital projects. \$5.6M of its 2021 Capital Budget is managed by City departments
3. Other approaches to evaluating Library impacts
 - a. A number of comparator municipalities have conducted Economic Impact Analyses and found that every \$1 invested into the library system can generate between \$5.59 (Hamilton) and \$5.97 (Markham) in direct and indirect benefits to the City
4. Mississauga Library employees participate in the City's LEAN program, which trains and empowers staff to identify cost savings and avoidance opportunities on a daily basis
 - a. Improvements identified since 2015 have resulted in \$800,000 in operating budget savings through 27 small improvements and two Green Belt certified projects

*Metrics collected were compiled based on the most up-to-date available public data (ex. Public Financial Statements, Canadian Urban Libraries Council Data, Library Annual Reports)

Jurisdictional Scan Key Findings

Brampton Library offers fewer programs than comparably sized Library systems, but attendance is in line with larger municipalities on a per capita basis



Programing and Attendance Findings

1. Many jurisdictions have placed an emphasis on early literacy and reducing socioeconomic barriers to access as the foundational pillars for programming offerings
 - a. Markham has shifted their programming towards digital literacy and STEAM programming as part of the City's *Digital Markham Strategy*. This includes offering paid programming that supplements free offerings and offsets the loss of declining fine revenue
 - b. Stakeholder consultations have found Brampton is looking to expand its programming aimed at the young adults/undergraduate demographic. Other library systems have addressed this deficiency by adding youth representation operationally through volunteering activism or having a young adult non-voting member on its Library board.
2. Mississauga Libraries have found attracting post-secondary students to library services can boost entrepreneurship and start-ups in the community while retaining the demographic as customers for life
3. Brampton lags behind identified jurisdictions in total library card registrations (24.32% in 2017, 2017 CULC average of 41.09%), though this may partly be a reflection of how Brampton counts card registrations. However, the percentage of the population that are active cardholders is only relatively behind comparable jurisdictions that have more extensive facilities and branches than Brampton (22.56% of Brampton were active cardholders in 2018, compared to 27.4% in Mississauga and 27.93% in Hamilton)
 - a. Brampton's relatively low number of branches relative to other Library systems and temporary closure of branches at Chinguacousy and the NE Interim site are significant factors in Brampton's library card registration rate
4. The total number of programs (4,387 in 2017) offered by Brampton Libraries is below the program offerings of both similar-sized municipalities (i.e. Hamilton: 10,330 in 2017) and smaller sized (i.e. Markham: 8,474 in 2016). However, this is substantially driven by the number of branches, with both Hamilton and Markham having more branches.
 - a. Programming attendance per capita (0.2) is in line with larger municipalities like Mississauga and Calgary
 - b. Brampton's relatively low number of branches is a significant limitation on the number of programs run annually

*Metrics collected were compiled based on the most up-to-date available public data (ex. Public Financial Statements, Canadian Urban Libraries Council Data, Library Annual Reports)

Jurisdictional Scan Key Findings

The Public Libraries Act governs all Ontario Libraries, the vast majority of which employ an organizational structure similar to that of the Brampton Library



Governance Findings

1. The Ontario Public Libraries Act (PLA) requires that Library systems must operate as an independent entity, but there are some instances where the relationship between the Library and the funding municipality are closer than the act contemplated:
 - a. Mississauga Libraries operate as a City Division due to a 1995 council motion which was approved by both the Library Board and the Province. This motion still allows the Mississauga Library Board to maintain final control over operations and policy, though without SLA's as it was done at a time when they were not required under the PLA
 - b. Markham Libraries' reporting structure has the Library CEO being administratively accountable to both the independent library board and the Commissioner of Fire and Community Services. In this hybrid structure, Library operations are designed in closer collaboration with the City while still maintain its independence. The City provides IT services via Shared Services Agreement as well as informal assistance in Finance, HR and Procurement in conjunction with Library staff.
2. In all cases, the Library Board of each jurisdiction retains authority and oversight of the operations and policy making for Library Services including the ability to enter in to or discontinue any shared services agreements with partners such as the funding municipality
3. Innovative approaches to fundraising
 - a. Beginning in 2011, the City of Calgary and its Library Board have collaborated on a campaign to raise private donations to supplement municipal contribution, raising \$350M for the library system (as of 2019). Funds are allocated across four strategic pillars with large funders receiving recognition through potential naming rights in Library facilities
 - b. The creative studio within Calgary's new Central Library was initially planned to be funded via Kickstarter but was eventually funded by project partners through the All-In Campaign. Before the pivot 20% of the \$100,000 goal was raised

*Metrics collected were compiled based on the most up-to-date available public data (ex. Public Financial Statements, Canadian Urban Libraries Council Data, Library Annual Reports)

Jurisdictional Scan Key Findings

Brampton has fewer library facilities and a smaller square footage than comparable jurisdictions such as Mississauga, Markham and Hamilton



Facilities Space Findings

1. Many jurisdictions are following a Facilities Master Plan that has been updated and in alignment with current strategic priorities
 - a. In many cases where a Facilities Master Plan is in place, jurisdictions have set square footage per capita targets as long term goals for service expansion (ex. Markham's 2019 Facilities Master Plan has set 0.6 sf/capita long term target for its facility needs, a similar set in Brampton's 2011 Facilities Master Plan)
 - b. Mississauga's Library Master Plan advocates the use of debt financing to fund future library priorities under the condition of a stringent municipal debt level limit policy
 - c. Surrey Libraries places an emphasis on single-storied facilities that are visible from street level, which reduce operating and security costs
2. Collaborative Facility Planning models between Libraries and Funding Municipalities
 - a. Markham and Vaughan Libraries complete their facilities and strategic planning with the City's recreation, parks and culture departments, facilitating better alignment and coordination with the City's strategic goals on a holistic basis
 - b. Jurisdictions identified have all emphasized a shift towards building new or updating existing facilities to meet community hub demands, explore innovative service delivery and add more virtual spaces and infrastructure within the system. This includes integrating cultural and creative spaces within new multipurpose facilities
3. Leveraging Partnerships
 - a. Vaughan is working with Mackenzie Health to develop a new library branch within the new Mackenzie Health Hospital and its new Vaughan City Centre branch will feature a 24-hour self-serve facility and will operate in a mixed use facility with private corporations
 - b. Partnerships with local businesses to offer beverage or café services within libraries have provided new revenue while improving the atmosphere of common areas and drive customer visits

*Metrics collected were compiled based on the most up-to-date available public data (ex. Public Financial Statements, Canadian Urban Libraries Council Data, Library Annual Reports)

Jurisdictional Scan Key Findings

Brampton has fewer library facilities and a smaller square footage than comparable jurisdictions such as Mississauga, Markham and Hamilton



Facilities Space Findings Continued

4. Brampton offers the fewest branches and lowest square footage of all identified jurisdictions, and is one of two jurisdictions to lack a central library branch
 - a. Brampton's library space per capita (0.32 square feet (sf)/capita) lags significantly to comparable jurisdictions (i.e. Mississauga: 0.46 sf/capita, Markham: 0.55 sf/capita)
 - b. Libraries with an expanded central library have been able to dramatically increase their area per capita and drive increased visits
 - c. Jurisdictions (Vaughan, Markham, Mississauga, Hamilton) have found multi-use facilities to promote better access/visits, integration with City services to provide inclusive programming

5. Alternative Service Delivery Models
 - a. Fewer branches result in Brampton offering the fewest hours per capita (0.032) compared to the 2017 CULC average of 0.081. However, on an individual branch basis, Brampton has among the longest hours per week at 67 hours.
 - b. Hamilton has piloted an extended access pilot for its 2 branches with low open hours based on similar models implemented in Europe. It allows preregistered library card holders to access branches and services beyond regularly staffed hours. Staff at other locations provide remote support via video link and open + system by Bibliotheca. This has increased library hours from 17 to 60 hours a week at the branch as well as an increase in branch visits by 19% in 5 months
 - a. Brampton Library also offers extended access through the Study Hall program in which security guards monitor limited access for three facilities on Saturday and Sunday evenings from 6-10pm which are full to capacity
 - c. Hamilton has also launched pop-up library locations at City facilities to mitigate branch closures for repairs or at special events for programming

*Metrics collected were compiled based on the most up-to-date available public data (ex. Public Financial Statements, Canadian Urban Libraries Council Data, Library Annual Reports)

Jurisdictional Scan Key Findings

Brampton has above average circulation rates, despite having fewer branches, than similarly sized jurisdictions like Mississauga and Surrey



Libraries and Materials Findings

1. Despite having less branches in the community, Brampton has been able to delivery above-average circulation results on a per capita basis (6.82/per capita) compared to similar-sized jurisdictions (ex. Mississauga/Surrey). However, there is a jurisdictional shift towards expanding digital collections while gradually reducing physical collections
 - a. Calgary moved 13% of its physical collections to a warehouse (titles remain available via holds) in order to provide more open study space for its customers
 - b. Hamilton has seen circulation of materials and physical computer workstation usage rates flattening while experiencing a 10% increase in WiFi usage from 2017-18
 - c. Libraries have increasingly become community hubs to bridge the gap between home and school, resulting in increase in capital requests for materials to meet demands

2. Markham has expanded its materials, piloting a library of things in one branch in partnership with York Region, neighbouring library systems and local non-profit partners
 - a. Markham has also shifted its emphasis towards multilingual holdings to meet the demands of its ethnic market. 11.45% of its titled held are multilingual compared to Brampton's 5.47% in 2018.
 - b. Stakeholder consultations found the use of analytics in Markham have found a consumer demand for multimedia offerings. Presently, multimedia (ex. Blu-rays, DVDs) make up approximately 25% of Markham's circulation.

*Metrics collected were compiled based on the most up-to-date available public data (ex. Public Financial Statements, Canadian Urban Libraries Council Data, Library Annual Reports)

Jurisdictional Scan Key Findings

Brampton has more computer work stations than comparable jurisdictions, and a strong circulation rate for electronic materials



Technology and Innovation Findings

1. Alternative Service Models have been explored by all evaluated jurisdictions as a method to expand library services to underserved areas
 - a. Hamilton's experiences with library vending machines have found remote kiosks that distribute digital content to be a viable and cost effective method to expand library services in underserved areas
 - b. In addition to launching a self-serve library facility, Vaughan Libraries is evaluating the potential in place kiosks and book vending machines within community centres and high traffic areas (transit hubs, retail centres)
2. Brampton offers more computer workstations within its branches and has significantly higher usage rates of electronic databases compared to other jurisdiction. But there is an increasing need by customers for plug-in space, good WiFi coverage and shift towards portable or bring your own devices, potentially reducing reliance on physical workstations. Brampton Library supplements the total number of workstations with more flexible / loanable in-house tablet use
 - a. While Brampton has more workstations, the number of annual users is lower (319,450) compared to comparable jurisdictions who have less workstations (Hamilton: 787,800, Mississauga: 563,600)
 - b. Hamilton has also found adding small computer labs to smaller sized branches have driven an increase in library visits with branches that have launched labs seeing an increase in physical circulation
3. Markham Public Libraries is a leading user of predictive analytics to identify programming opportunities and gaps
 - a. Predictive analytics gathered from programming and circulation data are used to evaluate where materials are offered and programs are deployed
 - b. Library programs vary across branches with offerings scheduled based on demographic data and trends (ex. A music library was opened at a branch in close proximity to music stores, facilities and an identified musical community)

*Metrics collected were compiled based on the most up-to-date available public data (ex. Public Financial Statements, Canadian Urban Libraries Council Data, Library Annual Reports)

Appendix A – Detailed Jurisdictional Scan

Jurisdictional Scan Comparators

A number of factors are important to consider when reviewing the following jurisdictional scan materials:

- The jurisdictions identified subsequently were selected as comparators across a number of different variables, though they were primarily selected because they are diverse mid-sized municipalities in Canada and relatively comparable across most metrics.
- Surrey Public Library and Calgary Public Library are both governed by different provincial legislation than the other Ontario-based jurisdictions; however, many of the elements of that legislation are similar, and both Library systems share many of the same characteristics as the other jurisdictions reviewed.
- While many of the Library jurisdictions reviewed have some forms of shared services agreements with their funding municipality, Markham appears to have more extensive shared services than other jurisdictions. It is unclear whether chargebacks for shared services are included in Markham Public Library's budget.
- Mississauga Public Library operates as a City Division, which is a unique model compared to other jurisdictions reviewed.
- Data is generally drawn from the most recently available full year (either 2017 or 2018 depending on the data element being reviewed). In some cases it was not possible to find comparable data points for every year for the same data element. These cases have been noted specifically in subsequent pages.

Appendix A: Initial Jurisdictional Scan Findings

Categories	City of Brampton	City of Mississauga	City of Hamilton	City of Markham	City of Surrey	City of Calgary	City of Vaughan
Population (2018)	642,800	775,000	572,575	348,718	526,142 (2017)	1,246,337 (2017)	329,000
Annual Expenses (2018)	\$19,179,965	\$28,532,048	\$32,471,584	\$17,722,907	\$21,561,611	\$54,600,000	\$20,461,560
Expenditure per Capita (2018)	\$29.84	\$36.82	\$57.71	\$50.82	\$40.98	\$43.81	\$61.19
Expenses as a % of Total City Spending	≈2.1% (2017)	≈3.2% (2017)	≈1.7% (2016)	≈3% (2018)*	≈2.6% (2018)	≈1.8% (2018)	≈3.9% (2017)
Branches and Total Square Footage (2017)	7 (207,039 sq ft) (2018)	18 (347,253 sq ft) (2015)	21 (318,683 sq ft)	8 (165,041 sq ft) (2018)	9 (188,246 sq ft)	18 (469,800 sq ft)	10 (173,405) (2018)
Total Number of FTEs (2018)	158.2	373.37	283.71	178.43	186.8	492.6	104.43
Square Footage per Capita	.32 (2018)	.46 (2018)	.56 (2017)	.55 (2018)	.38 (2014)	.38 (2017)	.54 (2018)
% of Population that are active cardholders (2018)	22.56%	27.4%	27.93%	45.25	36.61% (2017)	50.41%	22.83%
Library Hours Per Capita (2017)	0.032	0.067 (2015)	0.085	0.065 (2016)	0.054	0.046	0.08
Annual In Person Visits (2018)	2,156,500	5,419,700	3,753,900	2,771,300	2,730,000	6,841,884	1,811,600
Visits per Capita (2018)	3.35	6.99	6.55	7.95	4.72	5.49	5.5
Annual Circulation (2018)	4,279,075	6,080,606	6,668,020	4,905,019	3,426,528	14,606,264	3,247,415
Circulation per Capita (2018)	6.65	7.84	11.65	14.06	6.51	11.72	9.87
Total Number of Library Programs Held Annually (2018)	6422	7333	9504	8118	5,663	17,359	3387
Program Attendance (2018)	150,300	152,399	184,530	150,857	N/A	N/A	83,057
Programming Attendance per active cardholder (2018)	1.04	0.72	1.17	0.96	N/A	N/A	1.09
Internet Workstations (2018)	321	313	454	179	240	300	73
Use of Electronic Databases (# of visits) (2018)	832,676	345,540	118,092	112,736	191,951	N/A	425,984
Professional Librarians per Service Point	4.14	2.4	0.75	4.38	N/A	N/A	5.97


Jurisdiction 1: City of Mississauga


About this Jurisdiction


The City of Mississauga has experienced massive growth in the last 20 years with an estimated 33% population growth between 1996 and 2016 (Statistics Canada). Over half of the population in 2018 were immigrants to Canada and over 70% of the population between 25-64 with some post-secondary education, higher than the provincial average of 65%.

With a central library and 17 branch locations, Mississauga Library System operates within a unique governance structure as a City division within the City's Community Services Department while maintaining its autonomy through the Library Board. This structure has allowed it to maximize shared services with the City as well a closer relationship with the funding municipality compared to many of its peers.

Key Jurisdictional Elements


- 


Mid-sized municipality similar to Brampton
- 


Employs an organizational model that is unique to Ontario
- 


Diverse population and user base comparable to Brampton


Lessons Learned

- 

Mississauga Libraries operates as a division of Community Services, with the board ultimately retaining control over operations
- 

Employees participate in the Lean Program, which provides trainings to empower staff to identify cost savings/avoidance opportunities on a daily basis
- 

Dedicated Shared Services team works closely with the City's Community Services Department and other areas such as HR, IT, Facilities Management, Legal, Finance and Communications as support in the delivery of services
- 

Internal research found users will likely visit joint facilities due to the convenience of having to avoid traveling to multiple destinations to access services
- 

Revised wayfinding through self-service, self direction technology that allow staff to divert to more high value tasks

Categories	City of Brampton	City of Mississauga
Population (2018)	642,800	775,000
Annual Expenses (2018)	\$19,179,965	\$28,532,048
Expenditure per Capita (2018)	\$29.84	\$36.82
Expenses as a % of Total City Spending	≈2.1% (2017)	≈3.2% (2017)
Branches and Total Square Footage (2017)	7 (207,039 sq ft) (2018)	18 (347,253 sq ft) (2015)
Total Number of FTEs (2018)	158.2	373.37
Square Footage per Capita	.32 (2018)	.46 (2018)
% of Population that are active cardholders (2018)	22.56%	27.4%
Library Hours Per Capita (2017)	0.032	0.067 (2015)
Annual In Person Visits (2018)	2,156,500	5,419,700
Visits per Capita (2018)	3.35	6.99
Annual Circulation (2018)	4,279,075	6,080,606
Circulation per Capita (2018)	6.65	7.84
Total Number of Library Programs Held Annually (2018)	6422	7333
Program Attendance (2018)	150,300	152,399
Programming Attendance per active cardholder (2018)	1.04	0.72
Internet Workstations (2018)	321	313
Use of Electronic Databases (# of visits) (2018)	832,676	345,540
Professional Librarians per Service Point	4.14	2.4

Jurisdiction 1: City of Mississauga

Areas of Inquiry		Relevant Outcomes Achieved/Insights Gathered
Strategic Objectives	<ul style="list-style-type: none"> 2019 Library Master Plan guides the long terms priorities of the Library Board to manage the City’s diverse needs Consultation themes identified: Strategic Positioning, Customer Experience, Service Delivery, Technology , Facilities 	<ul style="list-style-type: none"> Master Plan is revised every 4-5 years with a comprehensive review every 10 years Collections spending increased from \$3.49 to \$5.12 per capita in 2018 in alignment with focus towards lifelong learning and literacy
Financial Efficiencies	<p>Funding Partnerships</p> <ul style="list-style-type: none"> Sources identified to fund the Library’s projects include partnerships (particularly Region of Peel), Federal/Provincial Grants, Development Charges, Capital Reserves and Debt Financing 	<ul style="list-style-type: none"> The Master Plan advocates for the use of debt financing to fund certain components of future Library priorities, highlighting Mississauga's stringent debt level limits as a risk mitigator
Programming and Attendance	<p>2018 Statistics</p> <ul style="list-style-type: none"> 4.862M in person visits 135,000 program attendees and 2,100 outreach initiatives 933,000+ visits to library website 54,350 combined library hours combined Program attendance per capita increased 122% between 2010 and 2015, compared to an overall increase in attendance of 40% 	<ul style="list-style-type: none"> 88% approval of library services in Mississauga in survey The most effective tools for library programming promotion and communication were identified as City websites, online programming guides and tailored email newsletters Mississauga has historically offered less programming (per population) compared to its peers, but has increased its offerings substantially in recent years, representing an emphasis on programming to improve literacy and responsiveness to the local community
Fundraising	<ul style="list-style-type: none"> The library itself does not actively solicit charitable donations directly, but rather through an independent, volunteer-based charitable corporation (Friends of the Mississauga Library System) 	<ul style="list-style-type: none"> The independent charity group manages the Library’s book sales, donations drives and organizes fundraising campaigns to augment the services of Mississauga Library System. The group is a registered group with the City of Mississauga, with a code of conduct adopted for members and an internal executive board

Jurisdiction 1: City of Mississauga

Areas of Inquiry		Relevant Outcomes Achieved/Insights Gathered
Governance and Workforce	<ul style="list-style-type: none"> Mississauga is the most prominent system with a governance structure that has direct ties to the City. A council passed motion dictated the Mississauga Library System follow the City of Mississauga's policies and practices, with the exception of cases where the library board found a unique practice was required Mississauga Libraries operates within Community Services as a division with the CEO acting in Director capacity with some commissioner responsibilities Employees also participate in the Lean Program, which provides trainings to empower staff to identify cost savings/avoidance opportunities on a daily basis. 373.37 (FTEs) Paid Staff in 2018 with 721 volunteers 	<ul style="list-style-type: none"> The motion (when passed in 1995) was viewed legislatively as allowing the board to continue to have control and management of library policy and operations. However, the governance change occurred when the Public Libraries Act did not require signed service level agreements. Staff hired by the library are hired as City employees and managed by the City's HR staff abiding by City policy and practices. Mississauga has been able to receive the highest input from local volunteers (532.42 in FTE) compared to Brampton's 8.4 FTE equivalent despite having 564 volunteers. Since its launch in 2015, the Lean Program \$800,000 in operating budget savings have been identified from improved business practices from 27 small improvements and two Green Belt projects.
	<ul style="list-style-type: none"> Mississauga Libraries implemented a new organization structure with a focus of creating centres of excellence (expertise) in a customer-centric library. Dedicated shared services team that handles a broad spectrum of services including promotion, community development, web services, systems administration as well as the acquisition and processing of new materials. Digital Services and Technology team created with a focus on the development of customer facing technology improvements 	<ul style="list-style-type: none"> Primary areas of new structure include coordinated programming, responsive collections and digital services. Backend changes also included realigning the groupings of library branches and redesigning the roles/responsibilities of managers. The moves were made to address its new strategic goals of being a forward thinking, analytic-driven, digital library with an emphasis on innovation, technology, social engagement Library also works with the divisions within the City's Community Services Department (Ex. Recreation, parks, culture, fire and emergency) and other City areas such as HR, IT, Facilities Management, Legal, Finance and Communications as support in the delivery of library services

Jurisdiction 1: City of Mississauga

Areas of Inquiry		Relevant Outcomes Achieved/Insights Gathered
Facilities Space	Central Library and 17 Branches <ul style="list-style-type: none"> Central Library accommodates digital library services and processing teams that support all libraries and customers Divided into six service areas with an average of 125,000 in each area (2019 Mississauga Library Master Plan) Master Plan recommends a Library service provision standard of 0.5 square root per capita (0.46 sf in 2016) 	<ul style="list-style-type: none"> Mississauga forecasts additional library space will be required to accommodate the wider breath of collections, programming and anticipated new services that will be offered to different ethnic communities. Also under consideration are the unique spaces (ex. Makerspaces) for specialized programs and community areas as population areas become more dense and housing units become smaller There are currently six libraries that operated in shared spaces with community centres. Another four facilities are shared with schools Libraries with an expanded central library have been able to dramatically increase their area per capita and drive increased visits
	<ul style="list-style-type: none"> 2017 survey conducted by City found proximately to one’s residence as the primary reason for visiting a library, with the Central Library the most frequent facility used among respondents. 85% of respondents had visited a multi-use library facility 	<ul style="list-style-type: none"> Survey found a large number of library users will visit joint facilities due to the convenience of having to avoid traveling to multiple destinations to access surveys, while families have the ability to use multiple City services (ex. Recreation and libraries) simultaneously.
Library Materials and Usage	2018 Statistics <ul style="list-style-type: none"> 6.041 million items loaned 	<ul style="list-style-type: none"> Libraries have increasingly become community hubs to bridge the gap between home and school, resulting in increase in capital requests for materials to meet demands
	<ul style="list-style-type: none"> Residents aged 18-21 were more likely to be non-users than users. <30% knew the Library offered programs for their age group (ex. Makerspaces) 	<ul style="list-style-type: none"> Library is evaluating the possibility to develop a strategy to engage youth and young adults, in conjunction with volunteer teen advisory groups Consultant report to the City identified attracting university students to library services can boost entrepreneurship and start-ups, while retaining them as customers throughout life
Technology & Innovation	2019 Master Plan Recommendations <ul style="list-style-type: none"> Revise wayfinding through self-service, self direction technology that allow staff to divert to more high value task Non-traditional Service Delivery: Evaluating the possibility of self-service or express libraries to expand library presence beyond branches 	<ul style="list-style-type: none"> Ongoing need more customer-driven interactions and a focus to reduce dependence on traditional staff-assisted services. This allows staff to focus on more value added activities Express libraries or other non traditional service delivery options could address service gaps and enhance service delivery at potentially lower cost and faster to market than traditional branch expansion

Jurisdiction 2: City of Hamilton

About this Jurisdiction

Hamilton Public Library currently serves an area of 1137 km² with a 2019 operating budget of \$32M. Although Hamilton has a similar demographic profile as Brampton, it has an extensive 22 branch library system consisting of a Central Library, multiuse facilities and smaller scaled community branches, supported by 2 bookmobiles.

As part of its 2018-2021 Strategic Priorities, it has focused on addressing the disruptive changes facing libraries, including an increased competition for funding, and the growing need for digital content. These efforts have made them a forefront of adapting new innovative service models including an extended service access pilot, implementing book vending machines, and pop-up library

Key Jurisdictional Elements

- Mid-sized municipality similar to Brampton
- Highly unionized environment similar to Brampton
- Has recently launched a number of innovative service delivery projects

Lessons Learned

- Planning for new branches stipulate co-location in multi-use facilities with partners that align with Library vision
- Gradual shift from public access workstations to mobile tablets or customers bringing personal devices
- Remote service points that distribute digital downloads identified as a more cost effective and viable alternative service model than physical vending machines
- Additional opportunities to increase programming through contracted third party agencies, funded through grant funding
- Improvement from technology investments have shifted employees to higher value work and stable control of FTE increases
- First of its kind extended access pilot allows preregistered customers to access branch collections, facilities and technology beyond regularly staffed hours

Categories	City of Brampton	City of Hamilton
Population (2018)	642,800	572,575
Annual Expenses (2018)	\$19,179,965	\$32,471,584
Expenditure per Capita (2018)	\$29.84	\$57.71
Expenses as a % of Total City Spending	≈2.1% (2017)	≈1.7% (2016)
Branches and Total Square Footage (2017)	7 (207,039 sq ft) (2018)	21 (318,683 sq ft)
Total Number of FTEs (2018)	158.2	283.71
Square Footage per Capita	.32 (2018)	.56 (2017)
% of Population that are active cardholders (2018)	22.56%	27.93%
Library Hours Per Capita (2017)	0.032	0.085
Annual In Person Visits (2018)	2,156,500	3,753,900
Visits per Capita (2018)	3.35	6.55
Annual Circulation (2018)	4,279,075	6,668,020
Circulation per Capita (2018)	6.65	11.65
Total Number of Library Programs Held Annually (2018)	6422	9504
Program Attendance (2018)	150,300	184,530
Programming Attendance per active cardholder (2018)	1.04	1.17
Internet Workstations (2018)	321	454
Use of Electronic Databases (# of visits) (2018)	832,676	118,092
Professional Librarians per Service Point	4.14	0.75

Jurisdiction 2: City of Hamilton

Areas of Inquiry		Relevant Outcomes Achieved/Insights Gathered
Strategic Objectives	<ul style="list-style-type: none"> Community Beacon: foster community engagement through inviting physical and digital spaces Relevant and Responsive: support lifelong learning Learning and innovative Organization: seek new ways to learn and assist growth of customers 	<ul style="list-style-type: none"> Focus on prioritizing staff with opportunities to enhance skills and develop new competencies
Financial Efficiencies	<ul style="list-style-type: none"> 2019 Operating Budget: \$32M Trend towards digital services have reduced fine revenues by \$30,000 in 2019 Largest budget drivers in 2019 are Salaries, Wages and Benefits (\$440K increase in 2019) Improvement from technology investments have shifted employees to higher value work and stable control of FTE increases 	<ul style="list-style-type: none"> Total Operating Expenditures per capita: \$57.63 Hamilton's operating expenditures are significantly higher than comparable sized jurisdictions (ex. Mississauga and Brampton) due to a higher number of branches and service points Returns seen in new investments such as makerspace, printing and increase in room rental revenue
	<p>Economic Impact Study (Conducted in 2017)</p> <ul style="list-style-type: none"> Study found it delivers \$315 of economic impact per citizen, a total of \$161M (\$98 direct, \$63M indirect) to the City of Hamilton in 2016 Every \$1 invested into Hamilton Libraries generates \$5.59 in value 	<ul style="list-style-type: none"> \$1,595 in direct benefits generated by each branch per hour open Average household contributes \$122 in Municipal Tax dollars to the library receiving approximately \$795 in annual benefits through services of programs (net benefit of \$673)
Programming and Attendance	<ul style="list-style-type: none"> Over 180,000 participated in the Library's free programming in 2018, which is approximately equivalent to 1 in 3 residents 52,450 open library hours across 22 branches in 2018 21,981 new library cards issued in 2017 Extended Access Study Halls for quiet study offered at 2 branches <p>Extended Access Library service</p> <ul style="list-style-type: none"> Pilot project using open+ by Bibliotheca expanded rural branch hours to 60 hours a week from a previous 17 hours a week. Hamilton is the first system in Canada to launch this program 	<ul style="list-style-type: none"> Attendance per program in 2018: 19.4, increase of 4.9% from 2017 2 branches offer after hours quiet study to registered library users with access to library services included Under the rural extended access pilot, preregistered customers can access the collections, facilities and technology at the two branches beyond the library's regularly staffed hours. Staff are present for portions of a branches operations, with staff at other locations providing remote support via video link during extended hours. Modeled after European models, expanded access for Freerton branch have resulted in a 19% increase in visits in 5 months.

Jurisdiction 2: City of Hamilton

Areas of Inquiry		Relevant Outcomes Achieved/Insights Gathered
Programming and Attendance	<p>Creative Partnerships</p> <ul style="list-style-type: none"> Partner or participate in programming initiatives with over 80 local organizations Relaxed drinking and eating rules within shared facilities to accommodate need for more common spaces for customers Libraries have looked to expand inhouse services (ex. Literacy training) through partnership with third party agencies Hamilton offers Museum passes for municipal museums for eligible families (circulated 885 times at a value of \$15,045 in 2016) 	<ul style="list-style-type: none"> Libraries have found successful partnerships with businesses in opening cafes and refreshments. The partnership has worked particularly well in improving the atmosphere of common areas and community spaces for customers Additional programming offerings could be delivered through contracted third parties, often through grant funding
Governance and Workforce	<ul style="list-style-type: none"> Chief Librarian reports the Library Board of 11 trustees Library board remains an independent organization under the authority of the PLA, but aims to maintain partnerships with City and Council 283.71 Paid Staff in 2018 with 805 volunteers IT services and technology maintained by library inhouse 2019 focus on introducing LEAN assessments within workforce 	<ul style="list-style-type: none"> Hamilton, like Mississauga has been able to receive the higher input from local volunteers (510.97 in FTE) compared to Brampton's 8.4 FTE equivalent though higher volunteer intake The Library board retains final authority over the governance of Hamilton Public Libraries, determining policies, strategic priorities, and support the Chief Librarian/CEO
Facilities Space	<ul style="list-style-type: none"> 22 locations with a central library, two bookmobiles Smallest branch at 1,451 square feet with the largest (Central Library) at 146,00 square feet Circuit 4.0: creative collaborative multi-use space located within central library that acts as a makerspace, group meeting facility, concert hall for up to 400 people Pop-up libraries have been implemented to mitigate branch closures for repairs and for special events programming 	<ul style="list-style-type: none"> New branches serving growth areas should have a minimum of 10,000 square feet in urban areas Internal/external research have found attractive downtown libraries are powerful magnets in bringing together a diverse community and future users Recreation departments identified as the strongest partnership Pop-up libraries launched in City facilities in partnership with the City of Hamilton
	<p>Facilities Master Plan (First adopted in 2005)</p> <ul style="list-style-type: none"> Each library designed with 15 design principles approved by the Library board 	<ul style="list-style-type: none"> Design principles call for single-storey buildings whenever possible and that all new branches should be located in multiuse facilities with partners aligned with Library visions Libraries should be evenly distributed to ensure no resident would travel more than 15 minutes (by transit) to reach a branch

Jurisdiction 2: City of Hamilton

Areas of Inquiry		Relevant Outcomes Achieved/Insights Gathered
Library Materials and Usage	<ul style="list-style-type: none"> • 3.76M in person visits (2018) • 6.66M circulation (2018) • 781 unique computer sessions, 1,162M WIFI sessions • Digital collections has grown 31% in 2018 	<ul style="list-style-type: none"> • Circulation of materials rates and computer workspace sessions have remained relatively flat signaling a potential shift from physical infrastructure. This is evidenced by a 10% increase in WIFI sessions from 2017-2018
Technology & Innovation	<ul style="list-style-type: none"> • Considerations of adding mobile computer labs (or technology/tablet rentals) in smaller branches • Increasing need by its customers for plug-in spaces, supplying sufficient outlets and good Wi-Fi coverage <p>Alternative Service Delivery</p> <ul style="list-style-type: none"> • Previous pilots with library vending machines has to date not been adapted by customers as expected 	<ul style="list-style-type: none"> • Correlation found between adding computer labs to smaller sized branches and increasing physical circulation • Ongoing shift towards portable devices or users bringing their own devices, potentially reducing the reliance on physical internet workstations • While vending services to distribute content is expected to improve, it finds remote stations that distributes digital content as a more viable and cost-effective method to promote library services in remote areas

Jurisdiction 3: City of Markham

About this Jurisdiction

The City of Markham has experienced tremendous population growth and development, growing by an expected 119,700 to 460,200 in 2031. The ongoing growth has driven a need for stronger services and offerings for libraries with the biggest challenges being land availability and funding. The shift towards a more informed and aging population by 2031 has raised a need to revitalize existing facilities and service to meet the changing user needs combined with resident demands for more leisure facilities, community programming, open spaces and parks.

The library system is in the process of shifting its delivery model to focus on building a community hub, prioritizing programming, social spaces and integration with City and community partners. This includes exploring co-location opportunities with partners exploring alternative service and delivery models in neighborhood centres where population intensification is occurring.

Key Jurisdictional Elements

Mid-sized municipality similar to Brampton

Broader shared services mandate than most Ontario Libraries

Diverse population and user base comparable to Brampton

Lessons Learned

Updating library facilities as community learning hubs, emphasizing customer experience, programming and social spaces

Focus on identifying shared use spaces with service providers early in design process to capitalize on cost sharing opportunities

Library leads the development of an Integrated Leisure Plan that coordinates Markham's planning of parks, recreation, culture and library service facilities

A library of things pilot is currently underway in partnership with York Region, neighboring library systems and not-for-profit partners

Larger City role in redesigning delivery models, shifting from standalone to integrated models that focus on community access, equity and inclusion

Identify potential partnerships with landowners, private developers for co-location in mixed used spaces

Categories	City of Brampton	City of Markham
Population (2018)	642,800	348,718
Annual Expenses (2018)	\$19,179,965	\$17,722,907
Expenditure per Capita (2018)	\$29.84	\$50.82
Expenses as a % of Total City Spending	≈2.1% (2017)	≈3% (2018)*
Branches and Total Square Footage (2017)	7 (207,039 sq ft) (2018)	8 (165,041 sq ft) (2018)
Total Number of FTEs (2018)	158.2	178.43
Square Footage per Capita	.32 (2018)	.55 (2018)
% of Population that are active cardholders (2018)	22.56%	45.25
Library Hours Per Capita (2017)	0.032	0.065 (2016)
Annual In Person Visits (2018)	2,156,500	2,771,300
Visits per Capita (2018)	3.35	7.95
Annual Circulation (2018)	4,279,075	4,905,019
Circulation per Capita (2018)	6.65	14.06
Total Number of Library Programs Held Annually (2018)	6422	8118
Program Attendance (2018)	150,300	150,857
Programming Attendance per active cardholder (2018)	1.04	0.96
Internet Workstations (2018)	321	179
Use of Electronic Databases (# of visits) (2018)	832,676	112,736
Professional Librarians per Service Point	4.14	4.38

Jurisdiction 3: City of Markham

Areas of Inquiry		Relevant Outcomes Achieved/Insights Gathered
Strategic Objectives	<ul style="list-style-type: none"> Partnership in the development of the Leisure Master Plan with the Recreation department Focus on providing inclusive, accessible service to residents Provide branches that serve as Community Learning Hubs that facilitate community engagement and social interaction across ethnic communities 	<ul style="list-style-type: none"> Older Adult Strategy to focus on homebound and socially isolated seniors Digital Literacy Plan for residents to train and educate future/present workforce as part of broader Markham digital strategy Community Hub strategy aims to update existing facilities, evaluate innovative service delivery, and add more virtual spaces to the system
Financial Efficiencies	<ul style="list-style-type: none"> Total Operating Expenditures per capita: \$50.82 Economic Impact Analysis (Conducted in 2016) Markham Public Library generates \$82.6M in benefits to the City of Markham annually For every dollar invested, MPL generates \$5.97 of value or the equivalent of \$237 per resident 	<ul style="list-style-type: none"> Library collections were previously part of operating budget but due to PSAB rules, it has been transferred into capital request. Collections includes periodicals and electronic resources Ongoing multi-year plan to extend library hours into Sunday have been an estimated budget impact of \$25K annually per branch Paid programming offered in some branches offset the gradual decrease in fine revenue
Programming and Attendance	<ul style="list-style-type: none"> 2.3M in person visits (2018), Visits per capita (6.77 in 2016) outpace comparable jurisdictions (avg of 5.98) 4.9M annual circulation (2018) 150,000 attended library programs (2018) 11,951 new library members in 2017 Early literacy offerings (1000 books before kindergarten program for parents with young children) Paid STEAM programming also offered to supplement paid programming 	<ul style="list-style-type: none"> Library programming is shifting focus towards digital literacy and STEAM programming as part of the overall Digital Markham Strategy Adult Library volunteer strategy to support and expand library services through new community engagement Collaboration with Markham recreation services in program and facility planning to maximize offerings and address gaps Paid programming delivered by 3rd party contractors and offered only in branches that have been identified as target markets that have the appropriate demographics for the offering
	<p>Partnerships</p> <ul style="list-style-type: none"> Lendery (Library of Things) launched in 2019 at one branch, offering items beyond books for loan The City leverages over 60 partnerships to delivery programing and learning opportunities Partnership with post-secondary institutions to support the development of a new York University Campus and community engagement plan 	<ul style="list-style-type: none"> 1458 programs are delivered with third party partners Lendery program was developed in partnership with York Region, non profit partners. A second location is expected to open in the Newmarket Public Library system Master plan encourages opportunities to integrate cultural programs, creative pursuit spaces with shared spaces in libraries and recreation facilities

Jurisdiction 3: City of Markham

	Areas of Inquiry	Relevant Outcomes Achieved/Insights Gathered
Governance and Workforce	<ul style="list-style-type: none"> • Markham Public Libraries operates within the City’s Community and Fire Services department with the CEO reporting to the Commissioner of Community and Fire Services as well as the Markham Public Library Board • 178.43 (78 FTE equiv.) Paid Staff in 2018 with 634 volunteers. • Library CEO chairs the Director’s Forum at the City with other City Directors • Proactive in informing council of strategic plans and fostering buy-in Shared Services • Library maintains HR, hiring, communications, benefits reconciliation inhouse with the as-needed support of assigned City point of contact • IT was previously done in house, but absorbed by City as part of previous efficiency review • Library maintains their own procurement, but leverages City’s VOR, buyers and bulk buy discounts 	<ul style="list-style-type: none"> • Similar to Brampton, Vaughan has a large contingent of volunteers with minimal impact on operations. • Markham Library CEO remains administratively accountable to an independent library board, who dictates strategic direction, maintains governance and oversight of Library operations. The CEO is a Board Employee in which the board delegates the responsibility to supervise and lead the direction of the library • Hybrid model has been able to increase Library’s presence at the City, but largely due to strong relationship building • City will assist the Library with labour negotiations if necessary • SLAs currently in place for IT services, renewed annually • No Finance SLAs, largely informal. Library had previously had a vacant CFO position, but was eliminated with its responsibilities transferred to City. • No formal SLAs in place for multi-use facilities, recreation currently manages those facilities with library paying recreation occupancy costs
Facilities Space	<ul style="list-style-type: none"> • 8 Branches, 165,041 square feet (ranges from 4,300 to 29,700 sq feet) • Evaluating the development of alternative library service and funding models for libraries in intensification areas • Library has endorsed a target of 0.6 square feet per capita as a long term goal 	<ul style="list-style-type: none"> • Newest facility at Aaniin features a collaborative hub with state of the art digital resources and open concept design spaces (ex. Makerspace). The \$52M facility is located within the community centre with the design, programming, facility layouts developed through community focus groups and consultations. The facility follows recent library trends towards open-layout facilities that function as public squares and urban space • Branches are evenly distributed across each of Markham’s service areas (2 in each) • Total in persons at multi-facility branches are higher than single-purpose facilities
	<p>Integrated Leisure Master Plan (ILMP)</p> <ul style="list-style-type: none"> • Master plan that informs Markham’s planning of parks, recreation, culture, library service and facilities harmonized across all service areas, led by the Library in partnership with recreation and parks departments • The ILMP guides facility development of new libraries, service delivery of programs • Explore shared, flexible colocation space with the City and local service providers (school, faith groups, agencies, private sector) 	<ul style="list-style-type: none"> • Integrated master plan allows better alignment and coordination of City strategic objectives in a long range holistic basis, recommendations in reports apply to all departments • 2019 update advises to continue to leverage community partners in the provision of services and to redesign delivery options from standalone services to integrated models that focus on community access, equity and inclusion to overall city amenities • Look at integrating cost sharing opportunities early in development plans • Identify partner/co-location services with developers, public agencies, landowners within mixed-use spaces

Jurisdiction 3: City of Markham


Areas of Inquiry		Relevant Outcomes Achieved/Insights Gathered
Library Materials and Usage	<ul style="list-style-type: none"> • % of Multilingual Titles as % of Total Titles Held: 11.45% • Media items such as DVDs and Blu-rays make up over 25% of library's circulation 	<ul style="list-style-type: none"> • Markham has shifted its emphasis in recent years to focus on multilingual holdings to meet the demands of its growing ethnic market. Similarly, while Brampton has a diverse demographic of users, its multilingual total as a % of total titles is only 5.47%
Technology & Innovation	<ul style="list-style-type: none"> • First library in Canada to use automated RFID technology and self-checkout machines • Development underway on a Digital Markham Strategy with a goal of turning the Library into a Centre of Excellence for digital literacy <p>Leading user of predictive analytics</p> <ul style="list-style-type: none"> • The library leverages demographic data to predict user trends and deploy services and circulation (ex. Ethnic programming and materials) • Metrics used include radius of travel largely extracted from programming data and user surveys 	<ul style="list-style-type: none"> • Leader in RFID-based self service technology: 84% of borrowing transactions are done through self-service options in 2017 • Self-checkout technologies have helped the library improve convenience for end users and allow staff to keep pace with growth • Digital strategy aims to position Markham Libraries as a centre of excellence for digital literacy. Initiatives include the new Aaniin collaboration hub proof of concept and new digital programming. Markham plans to eventually market collaboration hubs in City facilities as a place for small businesses and students • Leading practice of leveraging analytics to schedule branch-specific programming relevant to community areas. (ex. New music library offered in musically inclined Markham Village branch area)


Jurisdiction 4: City of Surrey

About this Jurisdiction

The City of Surrey is a city with a youth oriented and diverse demographic. It has a higher proportion of children, teens and young adults than other areas of British Columbia. The Surrey Library system has grown into a mature urban system and one of the largest community services in the area. The library has matched the diversity and growth by meeting resident needs for expanded collections in 21 languages, computer technology, community spaces and 24/7 online digital access to databases.

Key Jurisdictional Elements

- 

Diverse population and user base comparable to Brampton
- 

Significant focus on community engagement similar to Brampton
- 

Similar operating model despite different governing legislation

Lessons Learned

- 

Work with over 100 community partners to build capacity and address community issues
- 

43% in digital literacy programs for teens and children, with an estimated 1289 participants
- 

Future focus towards building fewer, but larger facilities rather than small community branches
- 

Read-ability program delivers library materials to homebound seniors or those with disabilities
- 

Incorporating a café within Libraries encourages socialization and was included in Brampton’s resident needs

Categories	City of Brampton	City of Surrey
Population (2018)	642,800	526,142 (2017)
Annual Expenses (2018)	\$19,179,965	\$21,561,611
Expenditure per Capita (2018)	\$29.84	\$40.98
Expenses as a % of Total City Spending	≈2.1% (2017)	≈2.6% (2018)
Branches and Total Square Footage (2017)	7 (207,039 sq ft) (2018)	9 (188,246 sq ft)
Total Number of FTEs (2018)	158.2	186.8
Square Footage per Capita	.32 (2018)	.38 (2014)
% of Population that are active cardholders (2018)	22.56%	36.61% (2017)
Library Hours Per Capita (2017)	0.032	0.054
Annual In Person Visits (2018)	2,156,500	2,730,000
Visits per Capita (2018)	3.35	4.72
Annual Circulation (2018)	4,279,075	3,426,528
Circulation per Capita (2018)	6.65	6.51
Total Number of Library Programs Held Annually (2018)	6422	5,663
Program Attendance (2018)	150,300	N/A
Programming Attendance per active cardholder (2018)	1.04	N/A
Internet Workstations (2018)	321	240
Use of Electronic Databases (# of visits) (2018)	832,676	191,951
Professional Librarians per Service Point	4.14	N/A

Jurisdiction 4: City of Surrey

Areas of Inquiry		Relevant Outcomes Achieved/Insights Gathered
Strategic Objectives	<ul style="list-style-type: none"> Emphasis on continuing to build strong print and digital collections 	<ul style="list-style-type: none"> Focus on the library system eliminating social barriers and providing equitable access to residents
Financial Efficiencies	<ul style="list-style-type: none"> The City of Surrey funds 90% of the Library's budget, the province contributes 5% with the remaining 5% raised through fines, fees and fundraising 	<ul style="list-style-type: none"> Ongoing cuts to the provincial library grant has resulted in reductions to opening hours and potential service level cuts if the City of Surrey is unable to make up funding shortfall
Programming and Attendance	<ul style="list-style-type: none"> 2.73M in person library visits in 2018 31,874 adults and 183,079 youth participated in library programs in 2018. 6,579 benefited from outreach programs to vulnerable and newcomer populations 28,016 new library cards issued in 2018 2.19M visits to library catalogue 	<ul style="list-style-type: none"> 43% in digital literacy programs for teens and children, with an estimated 1289 participants (2018) 1190 of new library cards were issued at events through mobile circulation Programs align with City's overall sustainability charter to support socioeconomic goals (ex. Life-long learning opportunities)
	<p>Core Programming</p> <ul style="list-style-type: none"> Indigenous Collection Work with over 100 community partners to build capacity and address community issues (ex. Poverty, employment, newcomers) 	<ul style="list-style-type: none"> Outreach to vulnerable populations through community agencies Ongoing exploration the expansion of seniors, children and newcomer programming
	<p>Auxiliary Programming</p> <ul style="list-style-type: none"> Baby welcoming events Read-ability program delivers library materials to homebound seniors or those with disabilities Sensory Storytime programs for children with autism 	<ul style="list-style-type: none"> Read-ability program delivered 23,816 materials to program participants, largely delivered and supported by volunteers and community partners
Governance and Workforce	<ul style="list-style-type: none"> Operates as a registered charity and an organization separately incorporated under the Provincial Library Act Governed by the Surrey Public Library Board, who oversee governance and policymaking Two Divisions <ul style="list-style-type: none"> Administrative Services: manages the physical spaces, finance HR and information technology: manages image and raises awareness/funds 	<ul style="list-style-type: none"> City provides library with a majority of its core operating budget The board delegates operational responsibility to the Chief Librarian As a registered charity, it can actively solicit donations to enhance its programs/service

Jurisdiction 4: City of Surrey

Areas of Inquiry		Relevant Outcomes Achieved/Insights Gathered
Facilities Space	Facilities Master Plan (2014-2033) <ul style="list-style-type: none"> Between 1994-2014, over \$58M (2014 \$) were invested into library facilities, \$35.2M in additional funding proposed over the next 20 years (2014-2033) 98% of Surrey’s library space is leased (2017) Total library space per capita has increased from 0.2 (1997) to 0.38 (2014). Total floor space increased from 79,100 (1997) to 192,800 (2014) 	<ul style="list-style-type: none"> Surrey identifies the optimal size of new library branches to be between 15,000 to 25,000 for a population that is comparable to Brampton Operating several smaller branches found to be more expensive and offer less service than one well located and full service location Future focus towards building fewer, but larger facilities with areas to showcase innovations, forward thinking library service, rather than small community branches
	9 Total Branches 1 Central Library <ul style="list-style-type: none"> 81,400 sq ft 5 Community Library in City Centres <ul style="list-style-type: none"> Smaller specialized libraries based on demographics and expressed community interests 3 Neighborhood Libraries <ul style="list-style-type: none"> Meet local demands for leisure reading materials, programming 	<ul style="list-style-type: none"> Surrey has found that the opening of a new central library has improved the profile of the library in the community Central library facilities also used as ceremonial functions for public events Incorporating a café within Libraries encourages socialization and was included in Brampton’s resident needs
	<ul style="list-style-type: none"> Focus on welcoming, inclusive spaces Strategic plan highlights exploring extending library hours and offering services beyond our branches 	<ul style="list-style-type: none"> Aim to position the library as the heart of the community, a “community living room” When planning new facilities, Surrey considers: <ul style="list-style-type: none"> Locations that could become community hubs, technology, energy efficiency, sustainable features, strive to be architecturally significant Emphasis on single-storied facilities that improve visibility from street level, reducing operating, security costs
Library Materials and Usage	<ul style="list-style-type: none"> Books and film available in 21 languages 	<ul style="list-style-type: none"> 464,327 eBooks borrowed in 2018, a 20% increase from 2017
Technology & Innovation	<ul style="list-style-type: none"> Free Wi-Fi and 242 computer workstations across all branches (2018) 4 Computer Learning Centres at branches teach technology related skills 	<ul style="list-style-type: none"> Partnership with Google and local business associations to offer free workshops for small businesses


Jurisdiction 5: City of Calgary


About this Jurisdiction


The Calgary Public Library is the second busiest system in Canada consisting of 20 branches and a central library. It is in the midst of a major rebranding and expansion shifting its focus from primarily physical collections to becoming community hubs. This is headlined by its new Central Library Facility, which presents amenities that offer programming, meeting spaces and performance areas for the community as a whole.

Calgary has been proactive in its outreach initiatives for both strategic and financial gains. In partnership with the City, the board launched an ambitious fundraising campaign to attract funding supplementary to municipal support in the construction of its Central Library. The Library has also reached out to local partners (ex. Daycares, Schools) to achieve its strategic goals of early literacy and removing the socioeconomic barriers of residents.

Key Jurisdictional Elements


- 


Went through a rapid period of population growth similar to Brampton
- 


Potential lessons to learn about library card registrations and fundraising
- 


Similar operating model despite different governing legislation


Lessons Learned

- 

City in conjunction with the Board embarked on a fundraising campaign to solicit private sector funding for New Central Library
- 

Warehousing of books previously held at branch locations in favour of more study space and community facilities
- 

New Community Spaces within Libraries funded via Kickstarter and available to be booked by groups for community collaborations
- 

Introduction of children’s play areas and an increase in children’s programming for parents and their children
- 

Reduction of Users Fees including the reduction of fines, elimination of annual membership fees and fine-fee policy for youth

Categories	City of Brampton	City of Calgary
Population (2018)	642,800	1,246,337 (2017)
Annual Expenses (2018)	\$19,179,965	\$54,600,000
Expenditure per Capita (2018)	\$29.84	\$43.81
Expenses as a % of Total City Spending	≈2.1% (2017)	≈1.8% (2018)
Branches and Total Square Footage (2017)	7 (207,039 sq ft) (2018)	18 (469,800 sq ft)
Total Number of FTEs (2018)	158.2	492.6
Square Footage per Capita	.32 (2018)	.38 (2017)
% of Population that are active cardholders (2018)	22.56%	50.41%
Library Hours Per Capita (2017)	0.032	0.046
Annual In Person Visits (2018)	2,156,500	6,841,884
Visits per Capita (2018)	3.35	5.49
Annual Circulation (2018)	4,279,075	14,606,264
Circulation per Capita (2018)	6.65	11.72
Total Number of Library Programs Held Annually (2018)	6422	17,359
Program Attendance (2018)	150,300	N/A
Programming Attendance per active cardholder (2018)	1.04	N/A
Internet Workstations (2018)	321	300
Use of Electronic Databases (# of visits) (2018)	832,676	N/A
Professional Librarians per Service Point	4.14	N/A

Jurisdiction 5: City of Calgary

	Areas of Inquiry	Relevant Outcomes Achieved/Insights Gathered
Strategic Objectives	<ul style="list-style-type: none"> • Council directives for Library locations as a gathering place for all Calgarians to connect on civic initiatives (Inclusion, Reconciliation, Connection) • Library resources focused on promoting Early Literacy, Learning, Empowerment 	<ul style="list-style-type: none"> • Resident engagement found early literacy is a top priority • Recently completed rebranding of visual identity and wayfinding to reflect the library goal of inclusivity • The new strategic plan places a holistic, decentralized view of the entire library system with branch priorities on par with those of the Central Library
Financial Efficiencies	<ul style="list-style-type: none"> • Fine-free policy for youth materials planned for 2019 • Financing the Central Library aided by City's Add-In campaign, which raised private donations to supplement municipal contribution beginning in 2011. • Idea Lab, the Central Library's studio was initially planned to be funded via Kickstarter but was eventually funded by project partners through the All-In Campaign. Before the pivot 20% of the \$100,000 goal was raised 	<ul style="list-style-type: none"> • Currently evaluating reducing printing and marketing distribution expenses through a review of communication priorities and channels • As of June 2019, the Add in Campaign has raised 98.5% of its goal of \$350M to the library system. Naming rights for certain facilities in Libraries were given to significant private contributors (ex. TD Great Reading Room at Central Library)
Programming and Attendance	<ul style="list-style-type: none"> • Library services delivered by the Calgary Public Library Board, with the involvement of partnerships with school boards, YMCA, police and fire. • Library works with the City on selected projects and initiatives • 7,100,000 Library Visits (2018) • Approximately 65,000 hours annually with year round Sunday service at 13 locations • Expansion and decentralization of newcomer services • Programming is standardized across branches 	<ul style="list-style-type: none"> • Reallocation of internal resources in recent years to support mobile and off-site service delivery, including services to areas of Calgary that lack permanent Library sites • Adult programs found to have lower participation rates compared to other programs • Have ongoing planning to run monthlong programs in 500 city daycares as part of early literacy outreach

Jurisdiction 5: City of Calgary

Areas of Inquiry	Relevant Outcomes Achieved/Insights Gathered
Governance and Workforce	<ul style="list-style-type: none"> • Calgary Public Library Board set up as a separate legal entity in accordance with the Alberta Libraries Act • Costs for governance and corporate services are included within the Library's operating budget as a separate legal entity
Facilities Space	<ul style="list-style-type: none"> • 21 locations • New central library (240,000 sq ft) acts as the central hub for Calgary's technology and innovation network. • Full play areas for kids opened in Library facilities • Meeting rooms open for use by community groups • Library branches has reduced bookshelves in favour of additional seating areas
Library Materials and Usage	<ul style="list-style-type: none"> • Library has recently eliminated its \$12 annual membership fees and reduced fees • Physical collections has been reduced by 13% to adjust to digitization needs
Technology & Innovation	<ul style="list-style-type: none"> • 2019 Strategic Initiative aims to grow technology services through hardware, speciality software and wireless • Central Library established as part of City's technology and innovation network

Jurisdiction 6: City of Vaughan

About this Jurisdiction

The City of Vaughan and Vaughan Public Libraries jointly produce a long-range planning study for parks, recreation and library facilities every five years. The plan also acts as a defacto facilities master plan. The report works to align the goals of each department at the onset of new infrastructure investment, with a set of guiding principles developed with input from the City, Library and residents

Vaughan is also one of the many Canadian libraries who have undertaken an economic impact study first pioneered by the City of Toronto. The cost-benefit analysis identifies \$32M indirect and \$71M in direct benefits are generated for the City each year, with every dollar invested into the Library returning \$5.57 in value.

Key Jurisdictional Element



Mid-sized municipality with a comparably sized library system



Operates under a traditional library model similar to Brampton



Diverse population and user base comparable to Brampton

Lessons Learned



Ongoing emphasis to building shared used facilities with City services, leveraging cross-programming shared spaces, and economies of scale



Exploring alternative service models such as the self-serve storefront and creative partnerships to address service gaps and test the potential for supplementary permanent facilities in high growth areas



Target capital investments towards renovations of older facilities to optimize spaces towards functionality, flexibility and customer-centric interior design



Half of the Library's capital budget is managed by facilities services and infrastructure delivery departments



Vaughan is one of many Canadian libraries who have conducted an economic impact study to estimate the economic impact of its service

Categories	City of Brampton	City of Vaughan
Population (2018)	642,800	329,000
Annual Expenses (2018)	\$19,179,965	\$20,461,560
Expenditure per Capita (2018)	\$29.84	\$61.19
Expenses as a % of Total City Spending	≈2.1% (2017)	≈3.9% (2017)
Branches and Total Square Footage (2017)	7 (207,039 sq ft) (2018)	10 (173,405) (2018)
Total Number of FTEs (2018)	158.2	104.43
Square Footage per Capita	.32 (2018)	.54 (2018)
% of Population that are active cardholders (2018)	22.56%	22.83%
Library Hours Per Capita (2017)	0.032	0.08
Annual In Person Visits (2018)	2,156,500	1,811,600
Visits per Capita (2018)	3.35	5.5
Annual Circulation (2018)	4,279,075	3,247,415
Circulation per Capita (2018)	6.65	9.87
Total Number of Library Programs Held Annually (2018)	6422	3387
Program Attendance (2018)	150,300	83,057
Programming Attendance per active cardholder (2018)	1.04	1.09
Internet Workstations (2018)	321	73
Use of Electronic Databases (# of visits) (2018)	832,676	425,984
Professional Librarians per Service Point	4.14	5.97

Jurisdiction 6: City of Vaughan

Areas of Inquiry		Relevant Outcomes Achieved/Insights Gathered
Strategic Objectives	<ul style="list-style-type: none"> Joint Facilities Plan with City's Recreation and Parks Department reviewed every 5 years, encompassing all parks, recreation and library facilities Vaughan has shifted focus towards building multi-used facilities over single purpose due to operation inefficiencies and narrow usage for single-use facilities 	<ul style="list-style-type: none"> Better alignment of goals and priorities with a focus towards shared used facilities Ongoing strategic priority to increase library hours at resource library and co-located branches in community centres Multi-use facilities found to promote better public access, inclusive programming and focus on multi-functional multi season facilities. (Ex. Brampton can maximize underutilized season facilities such as the ski hill)
Financial Efficiencies	<ul style="list-style-type: none"> Total Operating Expenditures per capita: \$61.17 Large portion of Library capital budget is allocated toward infrastructure replacement 	<ul style="list-style-type: none"> Large operating expenditures relative to its size attributed to Council and Library Commitment to establish Vaughan Library system as a leading practice in innovative and branch operations Half of the Library's capital budget is managed by facilities services and infrastructure delivery departments
	<p>Economic Impact Analysis</p> <ul style="list-style-type: none"> Vaughan is one of many Canadian libraries who have conducted an economic impact study to estimate the economic impact of its service Study found it delivers \$315 of economic impact per citizen, a total of \$103M (\$71 direct, \$32M indirect) to the City of Vaughan each year Every \$1 invested into Vaughan Libraries generates \$5.57 in value 	<ul style="list-style-type: none"> Direct benefits include (items borrowed, meeting space, database/reference services, programming, technology) Indirect benefits include (capital costs, employment/training, materials, operations) Each branch generates \$2,026 in direct benefits each hour open
Programming and Attendance	<ul style="list-style-type: none"> 3.2M in person visits in 2018 Over 15,000 new cardholder registrations each year 27,250 open library hours in 2017 96% Citizen satisfaction with Library services in 2018 New programming offerings include full day library based camps and internal courier services Continue to offer newcomer services and programming 	<ul style="list-style-type: none"> Most common reasons for visiting Vaughan Libraries: 1) borrowing materials, 2) reading, 3) programming 4) studying Has recently increased programming to respond to local needs (ex. Digital literacy, technology training, workplace readiness)

Jurisdiction 6: City of Vaughan

Areas of Inquiry	Relevant Outcomes Achieved/Insights Gathered
Governance and Workforce	<ul style="list-style-type: none"> Governed by the Vaughan Public Library Board, in accordance with the Public Libraries Act 104.43 Paid Staff in 2018 with 1313 volunteers
Facilities Space	<ul style="list-style-type: none"> 10 locations, 11th under construction Tiered decentralized facility framework <ul style="list-style-type: none"> 3 Resource libraries (avg 35,200 sq ft) 7 Branch Libraries (avg 9,700 sq ft), 4 co-located Off Site (outreach) services with no dedicated space Virtua services Recently opened new central resource library and refresh renovations across city branches Growth from 7 to 10 locations between 2013 to 2018 <p>Partnerships</p> <ul style="list-style-type: none"> Ongoing development with Vaughan Mackenzie Health Centre to develop a new library within its new hospital New Vaughan Metropolitan Centre Branch located in an office complex with corporations, YMCA and close proximately to mass transit
Library Materials and Usage	<ul style="list-style-type: none"> % of Multilingual Titles as % of Total Titles Held: 12.14% 72% of Vaughan households reported visiting Vaughan Public Libraries within the 12 months
Technology & Innovation	<ul style="list-style-type: none"> Mini sorters and new self-checkout machines introduced at some branches Facilities Master Plan considers the evaluation of self-service options such as kiosks and book vending machines to better embed library services within communities and high traffic sites (transit hubs, retail centres)
	<ul style="list-style-type: none"> Similar to Brampton, Vaughan has a large contingent of volunteers with minimal impact on operations.
	<ul style="list-style-type: none"> Library square footage increased from 0.54 sq ft to 0.61 sq ft between 2013 to 2018, a 44% increase between initial 2013 master plan and 2018 update New collocated branches are within civic facilities, operates with customer centric models that focus on space sharing, cross programming and leveraging the city's economies of scale Emphasis on building more portable shelving, outdoor spaces and gardens as well as barrier free access Vaughan uses a service radius of 1.6-4km for resource libraries and up to 1.5km for branch libraries Renovations of older facilities to optimize space and enhance interior design to increase functionality and flexibility
	<ul style="list-style-type: none"> Exploring alterative service models such as the self-serve storefront and hospital branch part of the system's reimagining libraries strategy to address gaps and high growth areas to test the potential for supplementary permanent facilities
	<ul style="list-style-type: none"> Vaughan has also shifted its emphasis in recent years to focus on multilingual holdings to meet the demands of its growing ethnic market. View of the library service as a valued service provide by the public
	<ul style="list-style-type: none"> Vaughan will be piloting a self-service 24/7 library within its new branch under construction

Appendix B – Innovative Approaches

Innovative Approaches

Throughout this review a number of innovative practices were identified that other jurisdictions have started to implement. While it is too early to identify significant outcomes associated with many of these innovations they are things that the Brampton Library should continue to monitor as potential ideas to adopt in the future if they prove to be cost effective and deliver meaningful service improvements to residents.

Innovative Library Delivery Practices identified through this review include:

Customer Innovations

- Vending Machines
- Library Branding
- Community Outreach
- Digital Libraries
- Transit Partnerships

Internal Innovations

- Shared Services
- Innovative Internal Services
- Staffing Structure Reviews
- Diversifying Staff Expertise
- Bibliotheca and open +

Facility Innovations

- Popup Libraries
- Extended Library Hours
- Transit-Oriented Library Service
- Express Libraries
- Community Revitalization

Customer Innovations



Toronto Public Libraries

TTC Reads (Transit Partnerships)

TPL and the Toronto Transit Commission (TTC) have partnered to allow riders to access sample eBooks and content curated by Librarians for commuters through the subway system's Wi-Fi network. The Library will also host activations at stations to sign commuters up for Library cards and eBook seminars.

Florida Libraries

The Right Service at the Right Time

The Right Service at the Right Time is an online tool for Librarians and customers to connect to relevant social services and government assistance. The portal helps to connect social services, community organizations with those in need, facilitated by Librarians.

Richmond Pubic Libraries

Vending Machines

In 2018, Richmond launched the first book dispensing machine in a community centre/school multipurpose facility, allowing the public to access popular library collections. Over 100 RFID-tagged books selected by staff is held in the dispenser and can be borrowed by card holders for 21 days. The machine replaced a previous once per week pop-up library service that had previously served the low density neighbourhood.

British Libraries

Common Identities

Similar to Canada, British Libraries are commissioned by local authorities resulting in a proliferation of various library branding and messages. As libraries look at the idea of establishing a single digital presence, British Libraries is examining the feasibility of implementing a single brand identity across the country to establish a singular UK-wide presence (ex. BBC, NHC) to raise awareness of the importance of library services for customers.

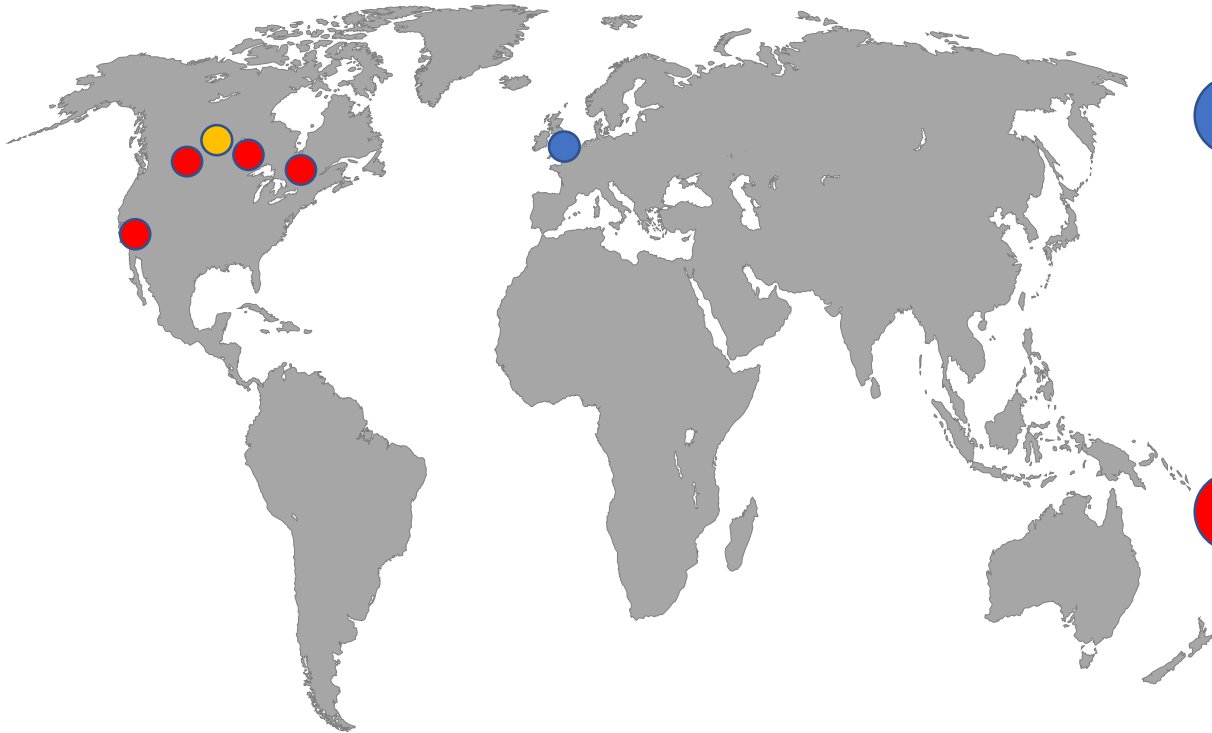
Tackling Financial Needs in the Community

Derbyshire Libraries offer their facility space to Community Banks and Credit Unions, where borrowers can pay their loans and assist those in financial distress.

Amazon Storage Lockers

West Sussex Libraries have entered into a formal contract with Amazon, to install online order pickup lockers at its 3 largest library locations. Installation and maintenance is provided by Amazon with no library staff involvement required. The lockers now have become a popular service for customers, provide a regular income for libraries and have little impact on staff time. The service also is able to attract non-library users to the library.

Internal Innovations



London Libraries Consortium

Shared Services Partnership Between Systems

The London Libraries Consortium is a business partnership between 18 library systems within the City of London. Together, they leverage their combined scale to generate efficiencies in IT, stock management, staff development, training and shared contracted opportunities. The collaboration has led to opportunities for the different systems to share staff expertise, benchmarking and embark on pilots that can be adopted by the LLC as a whole.

Various Library Systems

Diversified Staffing Expertise

Community Services Librarians - Pickering and Edmonton Library systems has modified its hiring practices to remove restrictions that require professional degrees. The library has looked to diversify staffing compliment to seek those with social work backgrounds and marketing skills.

San Francisco Libraries has also included social workers within their workforce to work with vulnerable communities, many of which are frequent users of their library system

Winnipeg Libraries has a dedicated tech training team, implementing various staff training options including, in-person seminars delivered by experts and online courses

Saskatoon Public Library

Organization Staffing Structure Review

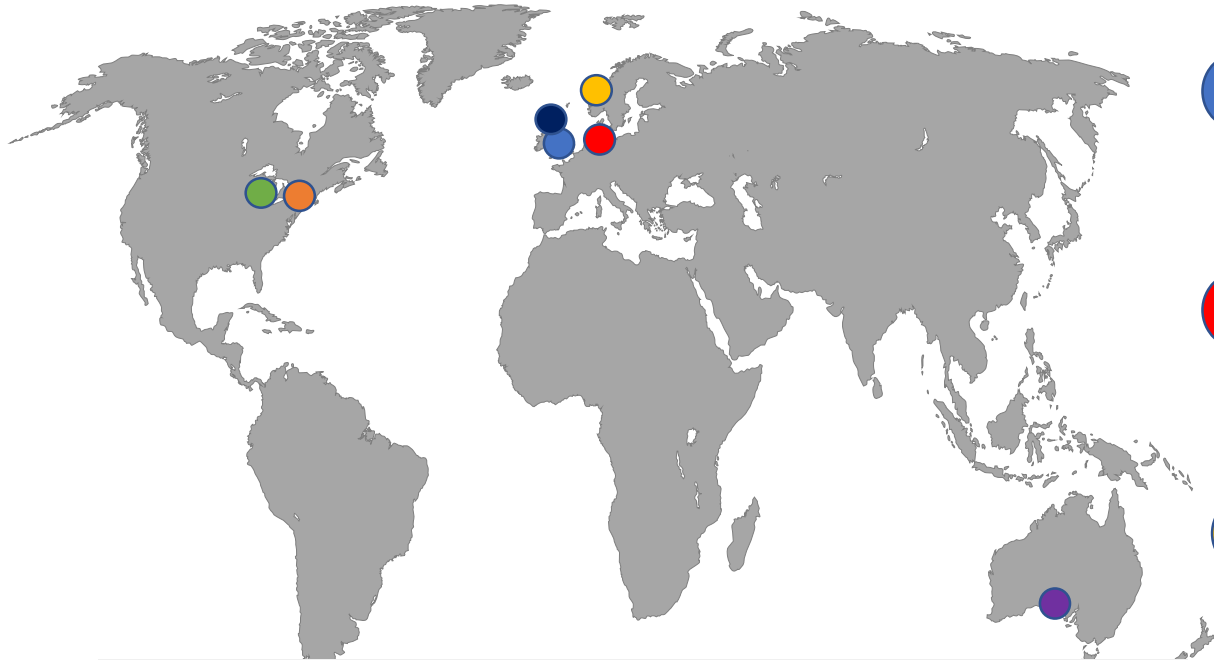
Saskatoon Public Libraries undertook a service and staffing review aiming for a new community-led service philosophy. The review advocated for staff to focus on strengthening relationships with community partners and groups, as well as technology troubleshoot training. Staff responsibilities have been reclassified with new portfolios that reflect strategic directives and a flatter reporting structure.

Bibliotheca's open +

Enabling Digitization and Resourcing Innovations for Library Systems

Bibliotheca's open + system allows for libraries to complement staffed library hours with unstaffed after-hours access through its access and security software. On average, library systems using open + have been able to extend hours on average of 52.8 hours/week with adoption across the US and Canada (Hamilton Public Library).

Facility Innovations



Devon Libraries

Co-Location with Post Office

In 2015, Devon Libraries opened a new library branch in a refurbished space co-located in a post office. The new location increased library hours to 50 hours a week from 15, supported by community volunteers and Post Office owners. Completed over just 12 months, the new location had generated a 24% increase in circulation in the first 3 months.

Toronto Public Libraries

Self-Service Open Hours Initiative

TPL is currently conducting a pilot at its two smallest branches for extended self-service hours. Both situated within community centres, the pilot increases library hours for residents to access services without any reductions to staffed hours. Cardholders are required to preregister with access to facilities requiring library cards/pins. The pilot aims to increase circulation and public space to the surrounding community at minimal cost.

UK British Telecom (BT)

Repurposing Old Public Infrastructure

The proliferation of mobile technology has left over 8000 red phone booths redundant. BT's Adopt a Kiosk program offers the phone boxes to community groups, district councils and citizens for £1 to convert for community use. Many of the 5000 booths taken for adoption have been purchased by councils for conversion into micro libraries.

Amsterdam Schiphol Airport

Reference Library at Transit Points

In partnership with Dutch Public Libraries, Schiphol's airport library is a permanent library facility for travellers with 1,200 books in 29 languages. Geared towards layover passengers, it is unique as it is not a lending library, but rather a reference library that seeks to add value to the transit experiences of travellers.

Danish Libraries

Pioneers of Unmanned Libraries

Facing potential cuts and closures, Danish libraries pursued the alternative option to establish unstaffed, self-service library services. Now, 86 out of 97 library systems have implemented open libraries for a total 260 branches. Out of the 33,000 hours a year the libraries are open, 56% of them are hours without staff. As a result of the increased hours, library visits almost tripled between 2012-2015.

Milwaukee Public Libraries

Fully Automated Express Library

In partnership between the City of Milwaukee Housing Authority and Milwaukee Public Library, an express library vending machine was launched in a public housing development. Also located near a transit facility, the enclosed shelter facility houses 340 items, access to the county catalogue and is open 24 hours a day.

Victoria Public Libraries

Libraries Support Community Revitalization

Mill Park Library was opened in one of Australia's highest growth areas. It was one of the first branches to be built as a hybrid digital-print library. A high emphasis was placed on facility design and leading engineering innovations with the features acting as a pillar to attract community building and revitalization in the area.



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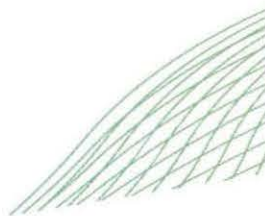
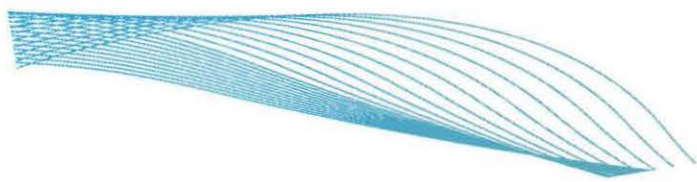


Lambton County Library

STRATEGIC CAPACITY PLAN

September 2013





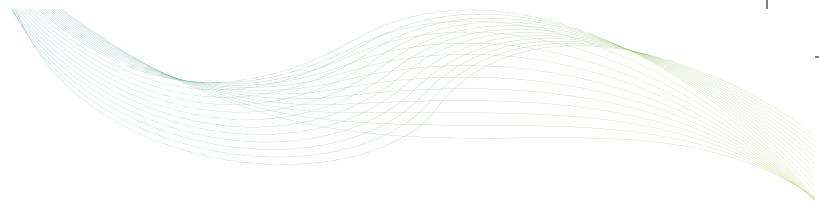


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EXECUTIVE SUMMARY

Libraries around the world are making exciting changes to their collections, programs, services, physical spaces and community partnerships. These changes equip libraries to better respond to the changing needs of their communities, and to be as relevant as possible in the 21st century.

In May 2012, Lambton County Council endorsed the Lambton County Library's report, "Refocusing the Lambton County Library." In doing so, it began to direct strategic attention to better equip the Lambton County Library to address new challenges and to fully explore opportunities to build community engagement. To this end, and with the generous support of Ministry of Tourism, Culture and Sport through its Cultural Strategic Investment Fund, Lambton County Library engaged Pillar Consulting & Advisory Services to develop a Library Strategic Capacity Plan that would provide a creative, sustainable approach for community engagement and strategy development; a plan that would cultivate collaboration, enable vibrant and inclusive visioning, and promote shared partnerships. Specifically, the consulting team was directed to research best practices in community-led librarianship and determine how the model could be applied in the County of Lambton.

With the growing recognition of Culture as the fourth pillar in municipal planning and development, each of the departmental strategic plans of the Cultural Services Division include an intentional focus on being congruent with other strategic municipal frameworks, including the County of Lambton Strategic Plan and the Lambton Cultural Plan. This consistency throughout will ensure the alignment and positioning of the Library ideally to become a connected, inclusive and collaborative partner that municipalities, community members and groups desire to engage with.

Ultimately, these strategic directions are designed to make the Library proactive and responsive to the needs of community and empower branch libraries to make significant local contributions to the economic and social well-being of their host communities. The ultimate goal is to provide Lambton County residents with programs and opportunities for them to be expressive, informed and engaged contributors to the vitality of the local community.

For this reason, the framework of community-led librarianship is ideally suited to be the strategic model for Lambton County Library. In community-led librarianship, library services are shaped and guided by the needs and preferences of users, with the community fully involved in the design of programs, services and partnerships. This requires taking the library outside of its physical walls and into spaces, whether public or private, across the community.

In June 2013, the project consulting team, along with members of the project steering team, had the opportunity to engage the community about their lives, their needs, and their dreams for the library and beyond, through the facilitation of 12 community forums across the county, the collection of survey data from over 800 respondents, and through focused conversations with 8 community members identified as key stakeholders.

The greatest single theme, and not entirely unexpected, is the notion of the shifting landscape across the county, encompassed in the following key themes and opportunities, which are discussed within this report:

- Community programs, partnerships & engagement: create a proactive approach
- Pace, pressures and the changing rural landscape
- Mobile families and the evolving economy
- Demographics: The changing face of Lambton County
- Recreation and leisure: Finding and building niches
- Redefining ourselves: What is “library” and where does library “happen”?

This report contains a model of community-led librarianship that has been tailored to the unique assets and characteristics of Lambton County, including a focus on and responsiveness to the aforementioned themes. It also outlines a 10-year implementation plan that can be delivered in a phased approach, specifically supporting courageous organizational change that, for the most part, can be achieved by repurposing existing financial resources. Six guiding principles of community-led librarianship, consistent with the overall strategic values and directions of the County of Lambton creative and cultural frameworks, have been identified and are explored. They are: Innovation; Proactive Action; Promotion and Storytelling; Collaborative Approach; Inclusive and Responsive; Measureable Impact.

“Library programs will become true building-blocks of community, bridging assets by connecting people. The cumulative record of these experiences will become the library collection of the future”.

~ Robert Tremain, GM Lambton Cultural Services

While this process is only the beginning when it comes to engaging the community in a new way, the data collected indicate a clear “Top 10” of ideas, which the Library can implement to demonstrate its commitment to responsive, innovatively and timely action, including: strategic partnerships with local school boards, the implementation of library as place, and pilot programs to test key program opportunities.

While challenges to the implementation of community-led librarianship exist, there are significant immediate and long-term opportunities to build and strengthen a relevant, modern and prosperous county library system. Ultimately, a thriving Lambton County Library will support a thriving Lambton County – for current residents, for newcomers, for visitors and for the next generation of citizens.



Visualization of key terms from survey question #6:
 “How would you describe the library in your community?”

SECTION 1: PROJECT BACKGROUND & APPROACH

Project background

In May 2012, Lambton County Council endorsed the Lambton County Library's report, "Refocusing the Lambton County Library." In doing so, it began to direct strategic attention to better equip the county's library to address new challenges and to fully explore opportunities to build community engagement.

Aligned with the core community values of respect, inclusion and integration, the Terms of Reference for the present project specified these essential goals and metrics for success:

- The adoption of community-led librarianship across Lambton County (respect for public voice)
- Increased sharing of open data in support of community engagement; development of a cultural portal (information sharing, civic empowerment, and citizen articulation); continued cultural mapping (enhanced potential for community partnerships); and broader recognition of the cultural economy
- A dynamic community dialogue that informs a report to council and all 11 local municipalities
- More instances of public/private partnership in branch libraries
- Empowerment of branch libraries to assume the role of cultural anchor in their local downtown and heritage streetscape
- Recognition of Lambton County Library as the prime cultural hub in smaller, rural communities across the county
- Measured increase of collaborative off-site programs involving the Library
- Measured increase to the range of leisure-time options made by branch libraries
- Recognition of the community-building potential of library partnerships and programs
- Integration of the role of the Library into the formal planning framework of the city and the county

To support the development of a Library Strategic Capacity Plan, the Corporation of the County of Lambton engaged Pillar Consulting & Advisory Services to:

- Support and contribute to the work of the project steering team
- Review and analyze opportunities from best practice libraries in other communities
- Facilitate community conversations, in various forms (e.g., public forums, interviews) that will lead to the development of a community inventory and action plan

- Recommend a service delivery model that will meet the strategic objectives and capacity of the organization, and summarize it in a written report and presentation

The consultants' goal was to act as a strategic partner in supporting the County of Lambton to achieve its project objectives of providing a creative, sustainable approach for community engagement and strategy development that would cultivate collaboration, enable vibrant and inclusive visioning, and enable shared partnerships.

Pillar Consulting & Advisory Services' approach leveraged and empowered participants' wisdom, expertise and strengths and fostered a culture of shared leadership between system partners.

Project approach

PROJECT FRAMEWORK (PLANNING)	OUTCOMES AND DELIVERABLES (COMPLETED)
PHASE i: Communication & Project Initialization	
i.1 Meet with the project liaison to discuss the project goals, the draft project schedule, the critical success factors and key challenges.	Completed April 25; project scope approved – as outlined here in column one.
i.2 In discussion with the project liaison and the project steering team, determine which stakeholders should be involved with this project.	Identification of 12 forum locations; key community stakeholders; date for staff engagement session (May 22); and other partner organizations and potential opportunities to engage. Forum and stakeholder lists available in project overview section of the report.
i.3 Provide a sample introductory memo about the project for stakeholders.	Process brand (“future forward”) and key messages finalized in collaboration with project steering team. Additions to original project scope: <ul style="list-style-type: none"> • News release • Layout and design for promotional posters and bookmarks, website and email graphic
i.4 Provide progress reports and communicate with the project liaison and the project steering team throughout the project.	Ongoing, including project memos and project steering team meetings on: <ul style="list-style-type: none"> • May 13 • Jun 3 • Jul 8 • Jul 29

PHASE I: Lambton County Library Services Review

<p>1.1 Review internal reports, studies and service reviews of the Lambton County Library, recent county and municipal cultural and strategic plans as well as similar information and best practice information from other communities.</p>	<p>Highlights of resources reviewed:</p> <ul style="list-style-type: none"> • County culture plan • Municipality strategic plan • Internal staff satisfaction surveys • Circulation statistics • Volunteer statistics • Community-led Libraries Toolkit (Vancouver, 2008) • Community-led Service Philosophy Toolkit (Edmonton 2013) • Developing community-led public libraries: evidence from the UK and Canada (Pateman & Willment, 2013)
<p>1.2 Prepare for facilitated planning session with project steering team. Outcomes of the session will include: review of current mandate, practices and system delivery; conducting a SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis of Lambton County Library, identification of potential stakeholders and key influencers to this project, and capturing of key discussions, findings and learning agenda items resulting from the session.</p>	<p>Planning session agenda and presentation deck attached as Appendix A.</p>
<p>1.3 Facilitate planning session with project steering team.</p>	<p>Completed May 13.</p> <p>Additionally, facilitated staff engagement session on May 22. Agenda, presentation deck, and follow-up summary attached in Appendix B and C.</p>

<p>1.4 Summarize information collected via planning session with project steering team. Construct internal planning document, including learning agenda. Distribute follow-up documentation to project liaison and project steering team.</p>	<p>Project vision as defined in collaboration with project steering team:</p> <p><i>Working in partnership, we'll engage a broad cross-section of internal stakeholders, citizen and organizations (from influencers to marginalized populations)</i></p> <p><i>Where we want to arrive together in August...</i></p> <p><i>A vision for and practical, measureable model of, community-led librarianship in County of Lambton, with two key areas of focus:</i></p> <ul style="list-style-type: none"> • <i>Creation of community-owned and community-driven hubs that are key cultural and social destinations;</i> • <i>Sustained community engagement and programming that meets needs of citizens beyond physical library walls.</i>
<p>1.5 Update internal planning document as well as other key items, such as intended impact statement, theory of change, and learning agenda, throughout process. Distribute updated information to project liaison and project steering team.</p>	<p>Session summary, notes and SWOT analysis attached as Appendix D.</p>

PHASE II: Community Inventory and Action Plan

<p>2.1 Deep exploration of library system best practices in other communities. In addition to document review (included in Phase I, Step 1), conduct interviews and other inquiries, as required.</p>	<p>See above list of documents reviewed. 11 individuals contacted for stakeholder interviews (with 9 respondents).</p> <ul style="list-style-type: none"> • Best practices examined included: • Vancouver Public Library • Edmonton Public Library • Halifax Central Library • Additional program and collection-based examples at a variety of libraries
<p>2.2 Design community engagement strategy, including 11 public forums in Lambton County communities, and interviews with key stakeholders and community groups.</p> <p>Specify outcomes and scope of discussion, including but not limited to: impact of library/ community/cultural sector on sustainability and quality of life, exploration of culture sector enrichment through the Library, opportunity for library programs to contribute to a creative, vibrant community, revitalization potential for libraries as community hubs, best practice samples of what libraries can mean to a community, and needs identification of library material.</p> <p>Develop tools, techniques and methods for data collection, such as facilitation plan and activities, interview and survey questions, multi-media approaches to information gathering (e.g., flipchart, video), etc.</p>	<p>Community engagement tactical plan available upon request.</p> <p>Engagement tools included:</p> <ul style="list-style-type: none"> • 12 community forums facilitating nearly 90 key community conversations • Online and paper survey (800+ responses) • In-depth with 9 key community stakeholders • Project communications completed via: <ul style="list-style-type: none"> • Public relations / earned media • Purchased media (county print and radio ads) • e-newsletters and e-blasts to county and Lambton County Library lists • Website homepage graphic and information page • Posters and bookmarks distributed at library and community locations <p>Forum facilitation design and survey questions available as Appendix E and F.</p>
<p>2.3 Facilitate public forums, stakeholder interviews and community conversations. Compile responses.</p>	
<p>2.4 Analyze and synthesize data and capture relevant findings that will contribute to the formulation of strategic objectives, potential partnerships and collaboration, and branding and marketing of library services.</p>	<p>Complete, as reflected in this report.</p>

Phase III: Project Team Support and Production of Final Document

<p>3.1 In addition to regular communication updates (Phase i, Step 4) that will include updated versions of the project planning and related key documents (Phase I, Step 5), the consultants will participate in (approximately 5-7) regular meetings of the project steering team. The consultants' role will be to ask questions, facilitate discussion, and manage conflict with the aim of meeting project objectives.</p>	<p>Ongoing, per project schedule.</p> <p>Project steering team was instrumental in assisting with identification of best practices, key stakeholder groups, sharing of survey, and participation in forum conversations.</p> <p>Project steering team meeting agendas, memos and follow-up communiqué to staff attached as Appendix G, H, and I.</p>
<p>3.2 Facilitate a high-energy, informative public presentation to kick-off community engagement process. Collect and compile data from this event.</p>	<p>Complete, to County Council, on June 5.</p> <p>Presentation attached as Appendix J.</p>
<p>3.3 Presentation of best practices and successful model outcomes experienced by communities similar in scale and make-up to County of Lambton to project steering team.</p>	<p>Ongoing throughout the process.</p>
<p>3.4 Prepare draft report of Library Strategic Capacity Plan. Review draft for errors or omissions with project liaison. Revise draft report, as required.</p>	<p>Draft report to July 26; group review and feedback July 29.</p>
<p>3.5 Present final report of Library Strategic Capacity Plan to project steering team, which will identify long-term goals that are aligned with the core community values of respect, integration and inclusion.</p> <p>The report will highlight potential for partnerships with government, nonprofit organizations, for-profit sector, and individuals. Additionally, the report will offer recommendations for implementation across sites in Lambton County, engagement indicators and benchmarks that lead to a comprehensive evaluation of success as well as methodologies for creating two-way dialogue and the recording of challenges and selecting priorities.</p>	<p>Date TBA</p>
<p>3.6 Present final report to Lambton County Council</p>	<p>Date TBA</p>

Twelve community forums were held across the Lambton County in June 2013. The dates and locations are listed below. The advertising poster is attached as Appendix K.

Tuesday, June 11

Legacy Centre
16 Allen Street, Thedford
3:00 to 5:00 p.m.

Forest Legion
58 Albert Street, Forest
7:00 to 9:00 p.m.

Friday, June 14

Brooke Alvinston Community Center
3310 Walnut St., Alvinston
3:00 to 5:00 p.m.

Watford Library
5317 Nauvoo Road, Watford
7:00 to 9:00 p.m.

Tuesday, June 18

Port Lambton Community Hall
507 Stoddard St., Port Lambton
3:00 to 5:00 p.m.

Florence Community Centre
6213 Mill St., Florence
7:00 to 9:00 p.m.

Friday, June 21

Point Edward Library
220 Michigan Ave
3:00 to 5:00 p.m.

Corunna Legion
350 Albert St., Corunna
7:00 to 9:00 p.m.

Wednesday, June 26

Camlachie United Church
6784 Camlachie Rd., Camlachie
3:00 to 5:00 p.m.

Oil Heritage District Community Centre
360 Tank St., Petrolia
7:00 to 9:00 p.m.

Thursday, June 27

Oil Museum of Canada
2423 Kelly Rd., Oil Springs
3:00-5:00 p.m.

Sarnia Library Theatre
124 Christina St. S., Sarnia
6:30 to 8:30 p.m.

The following stakeholders were contacted and asked for their input as part of this process:

Mike Bradley

Bev MacDougall

Warden Todd Case

Marty Raaymakers

Gayle Montgomery

Alison Mahon

Jane Anema

Vicky Ducharme

Lynn Brogden

Mayor of Sarnia

Councillor/CEO at Kiwanis Ctr

County of Lambton

Downtown perspective

Circles: Bridges out of poverty

Community Round Table

Sarnia Community Foundation

Sarnia Workplace Development Board

SLAC/ Lawrence House

Why Community-led Librarianship?

Libraries around the world are making exciting changes in their collections, programs, services, physical spaces and community partnerships to respond to the changing needs of their communities and to be as relevant as possible in the 21st century context. What this means is that library services are shaped and guided by the needs and preferences of users, with the community fully involved in the design of programs, services and partnerships. This includes taking the library outside of its physical walls and into new and unique community spaces.

Community-led librarianship “is predicated on the assumption that all people have needs and everyone has different needs. A needs-based library service has the strategy, staffing and service structures, systems and organizational culture which enable it to identify, prioritize and meet community needs” (Pateman & Williment, 2013, p.1). Community-led librarianship is a reframed perspective on how a library interacts with and serves its community. In doing so, all aspects of the library need to be aligned to this notion: recruitment of staff, job duties, program development and delivery, governance, collections, technology, and metrics and evaluation. The tables below illustrate the contrast between traditional library services and community-led librarianship.

	Community Assessment & Needs Identification		Service Planning and Delivery		Evaluation
	Community Assessment	Needs Identification	Service Planning	Delivery	
Traditional Planning	Staff reviews Demographic data Library use statistics Comment cards Community survey results	Staff identify service gaps or under-served communities	Staff review literature Staff consult with other staff and service providers Staff develop service response	Staff deliver service; develop the collection, hold the program, design facilities	Staff review various inputs Feedback forms Program attendance Collection use Library card enrolment [And] other statistics

Figure 1.1 Traditional planning
 Source: Pateman & Williment, 2013

	Community Assessment & Needs Identification		Service Planning and Delivery		Evaluation
	Community Assessment	Needs Identification	Service Planning	Delivery	
Community-Led Planning	<p>Staff reviews all of the traditional measures and staff spend time in community developing relationships with community members.</p> <p>Staff hear from community about what is important to them.</p>	<p>Staff discuss with community members and hear from the community what their priorities are.</p>	<p>Service ideas are the community's ideas.</p> <p>Community is engaged in the planning of the service.</p> <p>Staff act as partners and facilitators rather than as creators and teachers.</p>	<p>Community members and staff work together to deliver the service.</p> <p>Community partners involved in selecting collection materials.</p> <p>Community partners active in hosting the program.</p> <p>Community partners working collaboratively with the library to develop policy recommendations.</p>	<p>Staff review various inputs.</p> <p>All of the traditional measures and community and staff discuss:</p> <p>How did the process work?</p> <p>Did the service/ policy etc. actually address the need?</p> <p>What could have been done differently?</p>

Figure 1.2 Community-led planning
Source: Pateman & Williment, 2013

This means that building meaningful and sustained relationships with the entire community, and not just current patrons, is at the heart of community-led librarianship. As quoted in the Working Together project, Annette DeFaveri, British Columbia Library Association Executive Director, stated, “Librarians are not the experts on what our communities need or want in terms of library services – the community is the expert. It is our job to ensure that we develop a library service that reflects the community’s needs and vision. We do this with them, not for them” (“Community-Led Libraries Toolkit”, 2008). Community-led librarianship is an approach that works for all groups of people within a community: from key influencers to those who are or are at risk of being marginalized.

Two ground-breaking studies, *Open to All? The public library and social exclusion*, conducted in the UK, and Working Together, based in Canada, provide deep insight as to how to apply community-led librarianship models.

Community-led librarianship takes librarians out from behind their desks and away from books to interact with a wide variety of users. Library staff members become “the facilitators of knowledge exchanges between the community and the library. Each has something to learn from and contribute to the other. The community teaches the library about the community – its assets, its challenges and its needs – while, the library staff inform the community about library systems and where change can most readily happen” (Pateman & Williment, 2013, p. 217).

This notion is a departure from traditional service, outreach and program development in libraries, which are planned, designed, delivered and evaluated by library staff. In community-led librarianship settings, the aim is to co-produce library programs with community members who participate in every stage of development. This means programs and services inside of the library and outside of its physical walls – meeting community members where they are.

Many Ontario libraries, in both urban and rural settings, are adopting the community-led librarianship approach, some examples include:

- **DIGITAL MEDIA LAB, Innisfil Public Library**

This space is for musicians, bloggers, entrepreneurs, and other creative minds. The digital media lab is an interactive, collaborative space where users can work on media projects for free. Tutorials and workshops include Digital Media Tutorials (bring an idea or project to work on free of charge for an hour), Photoshop for Beginners (an interactive class where participants can use their own digital photo for practice), Bring Your Own Band (a collaborative musical session for bands), and Video Production (participants learn how to use digital video equipment).

- **HALIFAX PUBLIC LIBRARY**

The new library design is based on community collaboration in a five-storey building focusing on social spaces. The glass windows bring the outdoors in and show views of the city/harbour. There is a rooftop patio, and a café in the library. They have an open seating area used day and night for gatherings and performances. There are study pods and high-tech areas as well as adult literacy spaces and a book tree for children. It is positioned as place of gathering, of synergy and for inclusive use by the community, along with traditional library purposes.

Library systems that are not willing to engage with the community in new ways face continued challenges when it comes to patronage and support for funding that will lead to reduced branch hours and library locations and, ultimately, a tragic loss for the community. **Community-led librarianship is a path to growth, abundance and enduring relevance as libraries become a gathering place, a community partner, and a destination that is of priority value to a diverse group of community citizens, many of whom have never characterized themselves as library users before.**

Ultimately, community-led librarianship means changing how we conduct the business of libraries, and, how we measure the impact of library service and outcomes – beyond circulation numbers into true impact, neighbourhood-by-neighbourhood and audience-by-audience, as well as social change and community innovation.

“I love the libraries. I think that having a network of libraries right across the county is a bonus for all residents of the county, no matter where they live.” ~ Survey respondent

What is the modern library?

At its heart, community-led librarianship is predicated on the evolution of the library identity (how it is perceived and how it perceives itself) as seen through the lens of community need, challenge, opportunity and dreams.

Libraries have traditionally been couched by thought leaders as being the “living rooms of communities” (“Community-Led Libraries Toolkit”, 2008), that is, a source of information and, to a limited degree, of communication and gathering. Today, external factors such as technology and social change are pushing all traditional institutions to evolve or to risk the question of their very relevance.

It's good to see the LCL is willing to adapt in an age where the library continues to become less of a place for the storage of information and more of a portal to the wider world of resources. A vibrant and modern library can still be a great resource and asset to the community. ~ Survey respondent (via LinkedIn)

Modern and progressive library systems can and should be more – the whole home, if you will – a place for substantial conversations, for access to different points of view via conversation or collections, for borrowing of both traditional and remarkable items, for gathering with purpose or for no express purpose at all, for making, for gaming, for recreation and leisure, for learning, for access to lifestyles and life skills, for peer-finding, for friend-making, and for belonging.

The modern library is an equalizer. It is a resource, a friend and a destination.

This is the vision for a community-led county library system. Not simply a space, but a place – of education, entertainment, culture, gathering, community building, access and inclusion.

Lambton County: A shifting landscape - Key community conversations

During June 2013, the project consulting team along with members of the project steering team, had the opportunity to facilitate 12 key community conversations across the county.

Perhaps the greatest single theme, and not entirely unexpected, is the notion of the shifting landscape across the county. This includes economic and demographic considerations, technology penetration, the environment, the loss of in-community services, and the need for different, and more specifically targeted programs and services.

A shifting landscape necessitates a shift in philosophies, practices, and areas of focus. What this means for Lambton County Library, at a high level, is a shift in favour of the following broad categories of action:

- Proactive programming and program partnerships that leverage community interests and expertise
- More intentional presence of library in community (collections and programs, integrated into community spaces and gathering places)
- Re-imagination of physical spaces to create destinations/community hubs
- Focus on and access to local historical resources (collections, people, museums)
- Pronounced and intentional focus on access and inclusion
- Creation of programs and spaces specifically for young people (including cultural maker spaces, gaming clubs and other strategies for youth attraction)
- Literacy programming beyond traditional reading, writing, and arithmetic;
- Focus on individual economic and social support structures (e.g., job search resources and tools)
- Formalization of community engagement opportunities (Friends of the Library group, advisory councils)
- Marketing and promotional planning that is strategic, proactive and sustained

SECTION 2: STRATEGIC THEMES & OPPORTUNITIES

Guiding principles of community-led librarianship in Lambton County

Consistent with the guiding principals of County cultural planning – Accessibility; Diversity and Inclusion; Partnerships and Collaboration; and Accountability and Fiscal Responsibility – as outlined in the 2011 “Building a Creative Economy” Cultural Plan for Lambton County, the following guiding principals have been developed to frame community-led librarianship in the Lambton County Library system:

- 1. Innovation:** We will strive to provide opportunities for programming, services and spaces, which are beyond the norm of traditional library services, and think differently about how we plan, engage partners, and assess our success.
- 2. Proactive Action:** We will go beyond our physical walls and proactively engage with community partners and subject matters experts, rather than waiting for them come to us.
- 3. Promotion and Storytelling:** We will recognize that all library employees are ambassadors of a positive and exciting library story. We will empower our staff team to be champions in the community.
- 4. Collaborative Approach:** We will partner with our community (individuals, organizations, nations and businesses) and across branch locations, to ensure the sharing of resources (financial, talent) that create timely and relevant programs and services, and attractive spaces. We will not work in isolation and will view a thriving library as the privilege and responsibility of the entire community.
- 5. Inclusive and Responsive:** We will continually strive to include all members of our community, regardless of background or experience, recognizing and responding to a diversity of needs and acknowledging that a community-led library is first and foremost a place of access and inclusion.
- 6. Measureable Impact:** We will ensure our activities are measureable and will conduct measurement regularly to assess, evaluate, revise and improve programs, services and partnerships. We will move beyond collection of statistics to focus on impact and benefit for the people we serve.

Strategic themes and opportunities

Key themes and opportunities identified during these key community conversations were:

- A. Community programs, partnerships & engagement: A proactive approach
- B. Pace, pressures and the changing rural landscape
- C. Mobile families and the evolving economy
- D. Demographics: The changing face of the Lambton County
- E. Recreation and leisure: Finding and building niches
- F. Redefining ourselves: What is “library” and where does library “happen”?

The following is a summary of each along with recommendations on what the Library can act on immediately and in the shorter term, as it relates to community-responsive programs, services and spaces.

A. Community programs, partnerships & engagement: A proactive approach

Absolutely critical to the success of Lambton County Library in the implementation of community-led librarianship is the notion of a consistently proactive stance toward community engagement. Currently, those community members who have interests or talents, or who can bring expertise or resources to bear on the development of library programming, are welcomed when they come forward with an idea. However, these ideas and partnerships are not necessarily actively sought out in response to community need (nor is this community need systematically identified). As a result there is a strong culture of traditional interest-led recreational programming (e.g., knitting circles, book clubs) in a number of library locations. This existing programming provides a foundation upon which to solicit ideas and to build programs that are patron- and community-responsive and are innovative in the way they go beyond the traditional notions and use of the Library.

The following provides a selection of the most prominent opportunities for community programs and program partnerships:

1. Partners for strong children, families and communities

School boards: Partnerships in education represent the foremost opportunities for the library to develop and test a model of proactive engagement that meets direct community need. The streamlining of resources away from traditional in-school libraries has largely meant a compromised student experience and a lack of awareness about the value of libraries to lifelong learning, community building and literacy of all kinds. A partnership to provide in-house librarian services, an “every kid a card” free registration program, and the provision of rotating collections (from traditional print to technology lending) are just a few powerful entry points

into local boards and into an audience of new families. The Library need not be operating a stand-alone physical library space on school board property to realize these opportunities.

Economic supports and job search: Economic stability and jobs are a key point of concern across the Lambton County. Building on the technology that currently exists in library branches, the opportunity to offer regular job search and employment capacity-building programs and services across the county is powerful and timely. Partnerships (with, for example, the Sarnia Lambton Workplace Development Board) to identify key issues and opportunities, as well as to offer workshops and events such as job fairs, would position the Library well as an economic support structure and could potentially attract new users, from under-employed youth to recently unemployed mature workers.

Related to this is the opportunity to continue to grow and to evaluate the outcomes of existing child-family focused partnerships such as Best Start and Organization for Literacy using the tools and measurements provided as part of the community-led librarianship recommendations.

2. Community subject matter experts

The Lambton County is rich with subject matter experts, from industry gurus and technology buffs, to gaming prodigies and knitting aficionados. The Library has the opportunity to tap into this richness of expertise by officially inviting the community to offer suggestions, participate in program development and share this rich talent via the Library. These include:

- **Life Literacy** (from fundamental skills like cooking and sewing, to etiquette, job skills, stress management, and interpersonal communication)
- **Technology Literacy** (for all ages, using and understanding technology in a rapidly changing world, including tech tutors than can be booked out as part of a living library)
- **Historical Literacy** (understanding the rich history and impact of the Lambton County area on the world, e.g., Lambton Oil Heritage, and leveraging programs for intergenerational engagement around this legacy)
- **Cultural Literacy** (understanding the importance of our cultural institutions to the fabric of community – from traditional museums to maker spaces; understanding of multicultural aspect of the County: and, understanding how to live in a world of diversity and with tolerance and compassion)

3. Linking generations

The County's shifting demographics – in particular the aging population and the disengagement of youth – presents a unique opportunity for the Library to bring together different generations for joint programming, storytelling/sharing of history, and learning of all kinds. This might include a formal or informal mentorship program and a reverse mentoring program, which would see youth bringing forward their knowledge and experience to help older adults understand technologies and other emerging trends in new ways.

4. Environmental stewardship

Given the widespread enthusiasm for the Lambton County's great natural beauty and outdoor recreational activities, the Library has an opportunity to offer programs and host or develop groups who share this passion. This may include the Library acting in the role of community catalyst for conversations around issues and projects that represent significant environmental impact, such as new wind turbine farms (as just one example which was identified as a key point of concern in many forum conversations).

5. Next generation engagement

Overall, the disengagement of youth and the migration of young talent out of the county is a key point of concern across the region, as in many rural communities across Canada. This audience group is key to library sustainability in a number of ways – as potential users, as champions within their own families, as future parents of library users, as community economic drivers (if retained) and, most importantly, as a source of exciting and innovative new ideas and uses for library spaces, some of which are explored here.

Building on work already completed via the 2005 Teen Endeavours and Teen Advisory Groups project, this would include the popular notion of maker spaces or maker labs, which attract youth to engage with state-of-the-art technology and undertake creative expression, collaborative projects and professional digital media production (notation: see Innisfil Public Library Digital Media Lab.). This is an investment that would not only build local culture, but also foster positive peer groups and lay a foundation for future career opportunities. Spaces of this kind would also attract community support and sponsorship and would be worthy of significant public relations attention.

If there were just one strategic opportunity that Lambton County Library could focus on in the coming years, it should be the engagement of youth.

One of the themes that emerged from consultation was the loss of graduates from Lambton County due to a lack of job opportunities and the lack of arts and entertainment options. ~ County of Lambton Cultural Plan

B. Pace, pressures & the changing rural landscape

Like all North American communities, the villages and neighborhoods that make up the Lambton County are changing, in some cases dramatically. The pervasiveness of technology, where available, connects people more frequently and allows them to gather in person less often. Those without access to technology are increasingly isolated. Communities are also experiencing the effect of technology on inter-generational relations – where social norms, expectations and even life skills are perceived to be affected, or even lacking, in the next generation.

The pace of life and stress resulting from economic pressures and social issues (joblessness, drug use, loss of services) are on the minds of many citizens. These concerns are largely based on a strong sense of community, pride of place, and an eye toward the future sustainability of small communities, around which the library is ideally suited to organize and provide programming and service.

The Lambton County is a region that values its green spaces and outdoor recreation. Parks, waterways and biking/hiking trails are a hallmark of pride and are enjoyed by residents of all ages and backgrounds. Naturally, many residents are also concerned about the effect of pollution in their communities.

While religious communities are strong, they are waning in numbers. More pronounced is the decline in active community service clubs that have traditionally supported volunteerism, philanthropy and cultivation of the next generation – most prominent amongst them: Women's Institute, Lions, Kinsmen, Rotary and 4H.

This changing environment presents an enormous opportunity for the Library to be:

- A social connector and gathering place for people with both similar and diverse interests
- An equalizer and access point to technology and services, including job search tools, resources and workshops (from the latest sophisticated hardware and software, to more basic phone and fax services)
- A hub of learning and literacy of all kinds
- An advocate and mobilizer around issues specific to rural Ontario

C. Mobile families and the evolving economy

The Lambton County is not alone amongst rural communities in being subject to a variety of mounting pressures, not the least of which are economic.

That said, the fabric of community remains strong in much of the County – pride of place and of family legacy is evident in conversations – as much as does concern about the future, jobs, the loss of talent, and the closing up of main streets and the services they've traditionally housed.

Outside of the theme of jobs and business closures, which was by far a most prominent concern across all county communities, was the concern over loss or disengagement of young, talented people.

At the same time, access to services is changing. In an area where families are increasingly required, by necessity, to drive out of their communities to access services – from medical clinics to dance programs for their children – there can be a loss of connection with the core community and a belief within the next generation that they will eventually, inevitably, have to leave to find opportunity.

As with technology, those who do not have ready access to transportation must fare in isolation.

In this way, the Library has the opportunity to be the catalyst for access, inclusion and community building: to make a place for children and families to gather and to come to them with innovative programs and service partnerships. These may include:

- Community recreation programs (e.g., dance instruction, 4H clubs)
- Rotating collections in community locations (hockey arenas, ball diamonds, local farmer's diners)
- Family movie and game nights
- Meals hosted in community kitchens – for cooking instruction and compassionate hospitality
- In-library clinic hours with travelling nurse practitioners

“We have lost a lot of stores/industry/churches in the rural community forcing us to travel if we wish to take part. Because of this people are pulling away from community living...The Library has been here for many generations and is important to us...If not for the library we would not be in contact with many of our neighbours.” ~ Survey respondent

D. Demographics: The changing face of the County of Lambton

Several key themes are evident across the county related to demographics:

- A largely aging population
- Declining/disconnected youth
- Smaller family sizes overall but multiple generations to be supported (e.g., by the family farm)
- Isolation of retired farmers and their partners, and/or female farm owners
- Diversity, primarily represented by western and eastern European backgrounds

Library programming and services targeted at specific demographics is absolutely crucial to meeting the needs of a number of diverse populations – from knitting clubs and maker spaces, to interest groups, specialized book clubs and collections (non-English language, youth, etc.). And, while demographics are an excellent way to segment and attract the audiences, the ultimate goals of these programs are relatively consistent:

- To offer inclusion and belonging
- To demonstrate relevance and an innovation culture in the Library
- To become a community hub and gathering place that is rich with all age groups and backgrounds

“We were stay-at-home moms. Now we’re stay-at-home grandmas.”

~ Camlachie resident

E. Recreation and leisure: Finding and building niches

Sports are by far the most prominent feature in the spectrum of recreational activities in the county. Hockey, baseball, dance and, to a lesser degree, soccer, are the focus of many families throughout the year. Service clubs and community programs (such as those offered by 4H) continue to hold importance, but participation by volunteers and enrollees is waning. Both casual interest clubs (e.g., knitting, book clubs) and informal but regular gatherings (e.g., breakfast in the local diner) are staple activities for the older adult population.

There are very few opportunities to attract youth and so they are often seen hanging around in public places, or rarely seen at all (suggesting in-home activities such as gaming), with the exception of communities that have skateboard parks, which are popular destinations for the 12- to 18-year-old population.

“We should have Lego club all the time!”

~ A mother from Florence (on behalf of young son)

The dependence of many community activities on volunteers is cited as a key obstacle to new or continued community recreation programs.

The Library has a unique opportunity in this regard to provide a “full service” experience as it relates to special interest or niche programming. Specifically, the Library can bring together program experts (volunteers and staff members) and resources (collections of all kinds) and be the place to gather and meet. This can quite literally include everything from gamer nights, to sports equipment swaps, to travel clubs.

Additionally, during peak times in the sports season, the Library must come to the teams and their families, offering rotating collections at arenas, diamonds, recitals and pitches.

F. Redefining ourselves: What is “library” and where does library “happen”?

Three truths are critical to the success of community-led librarianship in Lambton County:

1. When library begins in childhood, it lasts for a lifetime (a love of libraries starts with babies)
2. We need to redefine what library is in the minds of users and non-users alike (beyond collections, beyond space)
3. In order to ensure continued relevance, libraries must evolve in lockstep with social trends, including focusing a lens on users that extends beyond seeking patronage, to delivering impeccable customer service

Marketing and communication is a central issue for Lambton County Library. While tactical promotional work is of good quality, in terms of informing the user population of programs and services, Lambton County Library is like many other library systems in “preaching to the choir.” The ability to move beyond traditional user populations, and to reposition the Library “beyond books” is absolutely critical. In the long term this should involve a rebranding of the library system (visually, verbally and experientially); in the short to medium term, this means an evolution in the values and perceptions associated with the Library and what “library is” in the 21st century context. (For example – Appendix L – *MyLife.MyLibrary. Campaign at LPL.*)

It is no surprise that the use of libraries has changed dramatically in the last two decades, with the evolution of technology, shifting demographics, and the rise of retail bookshops and coffee houses. The behaviours and expectations of those who would traditionally be library patrons have now shifted to be the preferences and purchasing habits of consumers. Ready-access to information at one’s fingertips is coupled with the fact that a true understanding of literacy, beyond basic reading and writing, continues to evade the majority of citizens. These are key threats to the viability of library systems and this is particularly true amongst young people who are neither using the library themselves nor bringing up their children to use the system.

Looking at library programs and services in a new way, through a community-led librarianship lens, helps us to examine the question of “where library happens” – that is, library is not just a community space and gathering place, but **library happens everywhere**.

This vision for community-led librarianship in Lambton County extends far beyond the physical walls – making the Library synonymous with community, with friends and peer groups, and with home and family:

Library happens at school.

Library happens at home.

Library happens on the field or in the arena.

Library happens on the screen.

Library happens at the local coffee shop.

Library happens in virtual worlds.

Library happens in my life, every day.

Today, thanks to the work of many Lambton County Library staff, the Library already happens in schools, baby play-groups, nursing homes and community centres.

For the future, library can happen absolutely anywhere – local businesses, coffee shops, grain elevators, at home on our screens and on our patios, in neighbourhoods and on street corners.

SECTION 3: A VISION OF THE LAMBTON COUNTY LIBRARY

Future Forward >>

A vision of the Lambton County Library for the 21st century

“My library is a place for....”

- **Gathering** – for sharing of knowledge, of recreation and leisure, for interest clubs, and to simply be in comfortable chair.
- **Culture & Entertainment** – for performances, both formal and impromptu, for sharing of County history and heritage from around the world.
- **Education** – for discovering the world and discovering my community, for learning new things and learning to read, regardless of age.
- **Community-Building** – bringing together partners who can do more for citizens together than in silos, and who have a passion for a prosperous and creative Lambton County.
- **Access** – to resources and tools, to experts and collections, and to one another, to welcoming smiles.

“My library changes lives...”

- By **welcoming babies** and their parents of all ages and experiences.
- Through **literacy programs** that range from technology and life skills to early reading and adult learning.
- Through job search tools and resources that **enrich economic opportunity** and empower confidence and economic self-sufficiency.
- By providing **inclusive access** to technology, collections and space.
- By simply being an open door, and a place that is warm in the winter and cool in the summer.

“My library values...”

- ***Community expertise*** – drawing on the richness of talent and resources in the county and sharing them via library programs and services.
- ***Diverse heritage and rich history*** – connecting residents, young and old, to community history, to each other and to the rich diversity in the new faces of Lambton.
- ***Children and youth*** – recognizing the perspectives and talents they can share today, and helping to shape their literacy and leadership skills for future contributions to our neighbourhoods and communities.
- ***Welcoming spaces*** – the creation of a physical place that illustrates all Lambton County Library has to offer: resources, expertise, safety, inclusion and gathering.

“I was in ‘7th heaven’ when I found out what an adult library card was for...a book from anywhere in the library. Incredible.”

~ Alvinston resident

“By the community, for the community”

It is important to note that a future expectation on behalf of the Library that the community itself will take ownership of, pride in, and accountability for developing a thriving and relevant Library system is just as important as the Library’s vision of community engagement and support. As the implementation of community-led librarianship gets underway at Lambton County Library, this will include active participation by the community – individuals and organizations – in the identification of needs, shaping of programs, and the development of resources (both human and financial) to support bold and innovative new programs, services and partnerships.

Community engagement Top 10 priorities and low-hanging fruit

1. Formalization of strategic partnerships with the Boards of Education
2. Development and implementation of a youth engagement strategy
3. Proactive programming and community expert recruitment, including a focus on programming for youth, inter-generations, economics/jobs, life literacy, and the environment
4. Implementation of library-curated and managed mobile community collections in unexpected places (ball diamonds, local coffee shops, skate parks)
5. Creation of access points (technology, communal phone, fax and television services) in all library locations, and exploration of other opportunities to enhance inclusion, including the lessening or elimination of Library fines;
6. The beginning of library as place, including the realignment over time of physical environments to mirror retail and coffee shop atmospheres, and the exploration of the viability of coffee stations in libraries
7. An intentional focus on family programming, in-library and in-community
8. A focus on marketing and awareness and promotion, beginning with key messages and an annual tactical action plan
9. Creation of hubs for service clubs and niche interest groups, including the cultivation of new volunteer people-power
10. Up to three focused pilots in multiple locations and based on geography and demographics, built on opportunities identified during this initial community engagement process. Recommendations include:
 - In-school programs, including mobile collections, visiting librarian and “every kid a card” sign-up program
 - Youth engagement and a maker space, in partnership with local business
 - Digital literacy and life literacy programming, including tech tutor program and intergenerational mentoring/reverse mentoring program



*Visualization of key terms from survey question #8:
 “What organizations might the library partner or collaborate with in order to meet your life needs?”*

Just the Beginning

As with any engagement process, it is critical to note that this is just the beginning, not the end, of the conversation. The proceeding pages outline a vision for formalizing, implementing and measuring the success of community-led librarianship in Lambton County.

A Model of Community-Led Librarianship for Lambton County Library

Re-Imagining Community Relationships & Community Impact in Lambton County



Let's walk through how the community-led librarianship model can be successfully introduced in the Lambton County

1. A community member or community group expresses an idea or a need.
2. A library staff member hears about this idea or need directly or indirectly. A library staff member proactively initiates follow-up with the community member or community group to gather more information about the idea or need.

3. Accessing the Library's deep relationships with a diverse set of community individuals, groups and organizations, a library staff member assesses whether existing community assets may be applied and examines how the Library may be able to support the need. To be considered, an idea or need must:
 - a. Be driven by the community and not by library staff. This includes a minimum threshold of leadership by one or a group of community members.
 - b. Be representative of a community need, preferably a diverse set of community groups.
 - c. Lead to increased engagement by the community of the Library.
4. A library staff member presents information to library decision-makers to gain support for moving forward and to be responsive to the community in a timely fashion. Branches should be empowered to make decisions about a certain number of community-led projects, while other decisions would be made by a committee at the system level that meets monthly. For example:
 - Branch staff can approve initiatives that utilize existing branch resources, such as space, collections, and allocated staff time. For example, community clubs using meeting space within regular branch hours, developing a cultural program that is aligned with a local event or anniversary.
 - The committee at the systems level can approve initiatives that require additional investment of library resources and projects that could be expanded to all 26 or multiple branches of the library. For example, investing in new types of collections, such as a bicycle borrowing program.
5. A library staff member communicates the decision of the Library to the community member or group. The Library collaborates as an equal partner with community members and together they act as leads for the initiative in the planning, design, implementation and evaluation of success.
6. Library decision-makers review evaluation data from this community-led initiative as well as others to determine what lessons may be learned. Information from all initiatives is shared internally and externally so that success and failures can lead to new ideas from the community.
7. All data leads into system success metrics, which are provided by the library management team to the GM of Cultural Services and reviewed by Council. The proposed community advisory committee provides insight to Council via management to help shape how resources are allocated (for program and services, technology, and collections) in the year ahead, based on community need.

SECTION 4: IMPLEMENTATION & CONSIDERATIONS

Implementation plan

Research on community-led librarianship (“Community-Led Libraries Toolkit”, 2008) and comprehensive organizational change suggests that a phased-in approach to implementation is best. The table below illustrates a 10-year plan categorized by the following themes:

- Developing community relationships & research
- Community outreach, programs & service delivery
- Reimagining of physical space
- Collections & technology
- Staffing, recruitment, training & education
- Library image & identity and mainstream community-led librarianship
- Standards & monitoring success

Theme	Year 1-2	Year 3-5	By Year 10
<p>Developing community relationships & research</p>	<p>Each branch identifies existing community relationships and potential ones (cultural mapping exercise is undertaken with proactive engagement by staff of local individuals and groups); Assess health of current community relationships using one framework across the system</p> <p>Library examines tools to record and track existing and potential relationships and community assets across the system</p> <p>Library system creates list of statistical research and sources of information that are defined as key indicators for health of Lambton community. Library system also identifies if there is information that the Library would like to have but is not currently collected</p>	<p>Each branch develops plan to build on community relationships (in alignment with community library outreach coordinator's goals and work plan)</p> <p>Relationship tracking system implemented across library system</p> <p>Library system tracks key community indicators for Lambton County and makes information available to library staff</p> <p>Explore possibility of developing group of cross-library leaders that can monitor CLL on national level; begin to position Lambton as rural leader</p>	<p>Key focus of all library staff is developing and nurturing community relationships</p> <p>Relationship tracking system is working well and is used to evaluate successful partnerships</p> <p>Key community indicators and library system metrics are aligned; library system is seen as influential community partner, responding in a timely manner to community ideas and needs</p> <p>Library collaborates with other agencies to gather community information identified as valuable, but to date has not been collected</p> <p>Lambton recognized as leader of CLL in rural environments</p>
<p>Community outreach, programs & service delivery</p>	<p>Provide training to front line staff and management about CLL's impact on programs and the program continuum</p> <p>Create staff task group to guide branches on how to assess existing program against CLL values and to make recommendations on what programs should continue, change or end</p> <p>In alignment with community library outreach coordinator's goals and work plans, new programs at 5 pilot branches will reflect CLL values</p>	<p>In alignment with community library outreach coordinator's goals and work plans, 65% of branches have programs that reflect CLL values</p> <p>Majority of library CLL programs are either led in partnership or are co-produced by community</p>	<p>100% of branches have programs that reflect CLL values</p> <p>Majority of all library programs are co-produced by community</p>

Theme	Year 1-2	Year 3-5	By Year 10
Reimagining of physical space	<p>Physical space of 5 pilot branches reorganized to retail-like layout and other CLL considerations</p> <p>Plans for future renovations and physical upgrades are reexamined with CLL as central theme in layout planning</p>	50% of existing physical spaces reorganized to retail-like layout and other CLL considerations	100% existing physical spaces reorganized to retail-like layout and other CLL considerations
Collection & technology	IT & Collections departments develop transition plan to align procurement processes with CLL model	IT & Collections pilot transition plan with up to 50% of budgeted resources	100% of collections and IT decisions are made using CLL lens

Theme	Year 1-2	Year 3-5	By Year 10
Staffing, recruitment, training & education	<p>Hire community library outreach coordinator(s) to lead consultation in 5 branches; establish annual goals such as 1 CLL project brought to fruition in year 1, 3 by year 2, and focused pilots across the system where appropriate (see section on Top 10/Low Hanging Fruit)</p> <p>Assign accountability for success of CLL implementation to all managers; one manager selected to support community library outreach coordinator</p> <p>Leadership team and all managers receive training on CLL and how it will be applied in LC; initiate supervisor training on how to support change and CLL in their teams</p> <p>Ensure adequate human resources (leaders and training) are in place to bring CLL to LC; amend the organizational structure of responsibilities and direct reports to make the system appropriate to CLL strategies</p> <p>Develop new job descriptions for all library staff reflective of CLL as the strategic framework for their role; Use this for all new hires</p> <p>Develop performance targets for all existing and new employees related to CLL</p> <p>Engage staff unions to garner support for adoption of CLL as a means to increase relevance</p>	<p>Community library outreach coordinators leading community consultation in 65% of branches; establish annual goals to bring progressive number of CLL projects to fruition</p> <p>Train all frontline staff on CLL and how it will be applied in LC; managers and leaders invest sufficient coaching time to support frontline staff with the change</p> <p>New hires continue to use updated job descriptions; transition existing staff to new job descriptions and performance targets developed in years 1 and 2</p>	<p>100% branches and employees work with CLL approach</p> <p>Plan and implement phasing out of community library outreach coordinator position as 100% library staff have CLL positioned as key accountability of their jobs</p> <p>Reward and recognition system introduced related to CLL targets</p> <p>100% frontline and leadership employee performance targets reflect CLL values</p>

Theme	Year 1-2	Year 3-5	By Year 10
Library image & identity; mainstreaming CLL	<p>Address current critical internal and external communication challenges</p> <p>Upgrades to current website are identified and implemented to increase functionality and introduce CLL</p> <p>Create two-way communication channels specific to change management process, including a robust intranet system that has intuitive navigation and can be contributed to by all staff</p> <p>Identify how adoption of CLL will merge with other key frameworks, Municipal Cultural Plan, County Strategic Plan, etc.</p> <p>Launch report to community, focusing on community engagement and partnership impact, through CLL lens (to continue to grow year over year)</p> <p>Implement tactical marketing framework – an action plan by month to ensure sustained visibility for Library across the County</p> <ul style="list-style-type: none"> • Initiate project to draft key messages about the library system, consistent with the CLL lens 	<p>Review vision, mission and values and refine with CLL perspective</p> <p>2 year strategic marketing plan launched, building on key messages and including the process to initiate rebrand reflecting CLL as a key strategic framework</p> <p>Intranet launched and being used by 50% of staff; continual improvements to system and content</p>	<p>Rolling 2 year strategic marketing – communications strategies and tactical marketing plan is implemented</p> <p>Rebrand project is complete after community-drive process focusing on the visual, verbal and experiential elements of CLL in Lambton County</p> <ul style="list-style-type: none"> • Vision, mission and values • New logo and branding tools developed • Upgraded website to foster CLL conversations and information <p>Intranet being used by all staff with online access, reviewed for useability and content every 2 years</p>

Theme	Year 1-2	Year 3-5	By Year 10
Standards and monitoring success	<p>Leadership team to develop plan to transition current metrics (e.g., circulation) to CLL relevant metrics (e.g., community engagement and outcomes)</p> <p>Approval by committee for plan to adopt new metrics</p> <p>Establish a library advisory committee comprised of non-elected supporters to provide advice and guidance to library leadership and board</p>	<p>Library system has implemented 50% of new metrics to use as basis for decision-making</p> <p>Establish Friends of Library associations with specific mandate at select branches</p>	<p>Board of directors is using CLL metrics to make decisions, along with advice and guidance of advisory committee</p> <p>Each branch (or cluster of branches) has Friends of Library associations</p>

The following notes supplement select points as necessary in the implementation plan.

2. Community outreach, programs & service delivery

- The recommended implementation of community-led librarianship as it relates to programs is directed in a way that simultaneously increases the number of programs that are introduced through community initiative and increases the involvement of the community in the design, development, implementation of programs. The program continuum is shown below for reference.

Outreach	Partnerships	Community development	Co-production
Library services are planned, designed, delivered and evaluated by library staff	Library services are delivered in cooperation with partner organizations	Library services are devised after developing relationships with local communities	Library services are co-produced by library workers and local communities

Figure 5.1 Program Continuum
Source: Pateman & Williment, 2013

- We recommend that, as the Lambton County Library becomes oriented to working with a community-led librarianship model, program outreach begins with community members, who currently are involved in the Library or have an association close to the Library, and then gradually works towards engaging members of the population who are or are at risk of being marginalized.

3. Reimagining of physical space

- Adopting a retail-like layout that centres around themes, rather than organizing collections based on the Dewey Decimal System, will create an environment that more users are comfortable with. Additionally, facing more book covers forward (as opposed to spines out) will foster an easier method of browsing, consistent with popular retail environments that attract consumers in large numbers.
- Considering community-led librarianship while doing structural renovations or moving into new locations means engaging the community ahead of plans being developed so that the space can be used in a way that is right for users. This may include community meeting rooms and informal gathering places, considerations about how many computer stations are needed, space for unconventional collections like bicycles, etc.

5. Staffing, recruitment, training & education

- We recommend that a new position, community library outreach coordinator, be created for Lambton County Library. This position would be permanent and must be well supported via reporting to a senior manager and be on par with librarians in the branches in order to achieve the goals. The rationale for creating a separate position at this time is that the community library outreach coordinator will be a vast departure for many library staff positions, and we feel there is a better chance of success if the organization hires externally for the required skills. (It should be noted that posting the role of community library outreach coordinator internally ahead of an external search, may yield a select number of potential candidates who happen to already work within Lambton County Library.) Most Canadian universities with library programs maintain a focus on technical skills and do not yet seek to develop skills that are required for community-led librarianship, such as humility, empathy, confidence, curiosity, critical thinking and self-awareness (Pateman & Williment, 2013). As the implementation plan progresses and library staff members are given the right training and support to work differently with the community, the community library outreach coordinator position may be phased out as library staff assume these responsibilities.
- A sample job description for the community library outreach coordinator is attached in Appendix M. Ideally, the selected community library outreach coordinators will not only have the skills and experience required for this role, but also be reflective of the community. It is the hope that community library outreach coordinators will work alongside library branch staff to facilitate increased or improved community relationships and to develop programs and services that are aligned with what the community has identified as a need, issue or asset. Additionally, community library outreach coordinators will initiate relationships with the local municipalities to support the town's (or city's) cultural and recreational plan objectives.

- It will be important to shift the work of all library staff. When “library staff” or “library workers” are referenced in this report, this is intended to encompass all staff within the system, at all levels and in all roles, from branch librarians to facility management roles. To successfully implement community-led librarianship, all positions within the organization must hold some degree of responsibility for this change. “With tightening budgets, there is a real danger that library management and decision-makers will react by entrenching themselves in traditional service approaches” (Pateman & Williment, 2013, p. 21). With reference to demographic statistics, some staff will experience this change through attrition, whereby individuals will move out of the organization. Starting in year 1 of the implementation plan, new library staff will be hired using updated job descriptions in which community-led librarianship is reflected as a key strategic framework (appropriate to the duties of each role). With education, training, coaching and encouraged by shifted metrics, all library staff will adopt this new slate of duties by year 5 and will eventually replace the need for the community library outreach coordinators at the branches in year 10.
- As soon as this model of community-led librarianship is adopted, it is imperative that Lambton County Library examines whether the optimal organizational structure is in place to make this organizational change happen. The leadership team must be ready to commit to its own learning and development about community-led librarianship and how to manage a team through organizational change. This will require even more investment in staff training, coaching and support for the next decade as compared to technical or functional responsibilities. It must therefore examine the structure of the management team, the ratio of supervisors to direct reports and the adoption of performance targets and team metrics that are aligned with the implementation plan. It is further recommended that the leadership team invests in team-building that fosters increased trust, communication and the identification of shared values, as the team must be a solid working unit that is committed to the achievement of results in order to move this change forward. A sample leadership team chart is attached as Appendix N. It has been created from a compilation of factors, including an examination of leadership teams at other libraries in which community-led librarianship is a key strategic priority, shifting the number of direct reports to a larger pool of supervisors, and assessing how accountability for this implementation plan could be distributed amongst a team. (It should be noted that conducting an organizational review of human resources was not within the scope of this project and further analysis is required by Lambton County Library before making any structural decisions.)
- As system evaluation metrics are shifted from inputs and outputs to impact and outcomes employee performance targets will need to be adjusted to match. Implementation of new performance targets does not mean adding to existing ones. In fact, we recommend that the leadership team identify what community outcomes it will hold itself accountable for and also identify which current metrics can be phased out.

- A large investment in staff training, at all levels, as required. This will include education related to community-led librarianship, leading and working through change (generally and specifically how the Library is leading change), and developing skills that allow library staff to engage with the community in new ways (for example, humility, empathy, confidence, curiosity, critical thinking and self-awareness). Beyond full-day, full-team learning sessions, the best chances of success for transferring learning and applying new skills will happen during team meetings and 1:1 coaching between supervisors and employees.
- Another important first step in the implementation of community-led librarianship will be to work with the staff unions to garner their support for this change, positioning this opportunity as a way to future prosperity instead of breaking from tradition.

7. Standards and monitoring success

- Most libraries track and make resource allocation decisions on metrics that do not tell the whole story of a library in the modern world. The number of library cards, in-person circulation numbers and program attendance are commonly used statistics. In community-led library models, research supports the transition to metrics that provide a “holistic, accurate and contemporary view” (Pateman & Williment, 2013, p. 228) of the library as a community partner. Suggested community-led library metrics, which illustrate a shift from inputs and outputs to impact and outcomes, include:
 - Evaluation at the organizational level, staff level and community level.
 - Community-based evaluation indicating if and how success is experienced by the community on a short-term, intermediate and long-term basis. These metrics are identified and designed in collaboration with the community.
 - Evaluation built in throughout and not only at the end of a process. In the case of service planning and delivery, evaluation occurs “when determining the target group, identifying need, planning service and programme-based responses, and when these services and programmes are delivered” (Pateman & Williment, 2013, p.199).
 - Impact indicators of the library reflecting the contribution the library is making to major policies and strategies within the county.
 - Evaluation of service standards related to community well being and social exclusion.

- We do not recommend any change to the rather distinctive governance structure of Lambton County Library, but we recommend implementing two strategies to better engage the community and provide further support to county politicians as they make decisions about the future of the Library.
- First, we recommend that if further interest is expressed by the community, creating an advisory committee comprised of non-elected community members representative of Lambton communities where branches exist. We suggest striking one committee with a system-wide focus and smaller sub-committees for each branch or set of branches within one municipality. Local advisory committees may also share their minutes and reports with local municipal councils, in order to bring forward any relevant issues that relate to facilities or locations. With reference to sample terms of reference attached in Appendix O, the advisory committee will not be responsible for governing the system or making budget decisions, but will be expected to provide vital advice and guidance to decision-makers, in the spirit of the community-led librarianship model.
- Second, the Lambton County community told us that they were interested in establishing a Friends of the Library group. Friends of the Library associations offer many benefits to organizations, including engaging passionate volunteers to support various events and fundraising activities (e.g., used book sales) and acting as external champions to advocate on important issues. Sample terms of reference and additional information sources attached in Appendix P.

A high level implementation plan organized sequentially is attached in Appendix Q.

Barriers to success

1. Organizational culture: The right people in place

The key to success of any major organizational change is whether the culture of the organization will support it. Community-led librarianship is a large departure from the traditional roles of library staff. Throughout this project, fear, apprehension and pockets of resistance by staff were expressed. Research suggests that there are three common themes of resistance by staff when implementing community-led librarianship. They include: a lack of resources (“how could we possibly do more when we don’t have time to do our jobs now”); the role of library services (“we are a centre of knowledge not community developers”); and the unknown (“how does this affect me?”) (Pateman & Williment, 2013). As libraries elsewhere have faced technological, environmental, economic and cultural trends that impact library use, institutions have made shifts to embrace opportunities; but the implementation of community-led librarianship – change on a much higher scale – has an impact on every aspect of the system.

Making community-led librarianship a key strategic framework of the Library will require the investment of time, focus and energy to repurpose existing resources. With approval of this plan, county politicians who govern the Library must be open to the Library measuring success differently, and thereby making funding and organizational decisions based on new strategies and metrics.

With reference to the proposed implementation plan, we recommend a phased approach to community-led librarianship, to be sensitive to the investment of resources and in consideration of the staff's response to a change of this magnitude. With a 10-year plan, it is believed that the influence of early adopters will strengthen the support of the new vision of the Library and that natural attrition will address those who choose not to embrace the change.

Restructuring the Management/Leadership Team

The senior leadership team of the library system needs to be comprised of dynamic change agents who are capable and willing to devote years of service to implementing community-led librarianship in the Lambton County. These people must possess the ability to influence and motivate their teams through ongoing and clear communication; they must be ready to embrace new systems, structures and styles of leading and coaching people; they must demonstrate 100% commitment to community-led librarianship in their words and actions and be ready to lead by example, leaving behind more traditional work methods.

While a full analysis of the roles and accountabilities of the senior leadership team was not within the scope of this project, it is apparent that structural change will be required in order to bring community-led librarianship to Lambton County Library. At this time, the position of branch services manager reportedly has a total of 140 direct and indirect staff reports. To provide the level of coaching and support to frontline and supervisory staff during a change at this level, it is impossible for one person to invest the time required. Second, other library systems that have adopted community-led librarianship (some with a smaller number of branches) have a larger senior leadership team with more experience of achieving the types of goals found throughout the recommended plan. A sample organizational structure is provided as Appendix N for consideration as library leadership begins to undertake this review process.

2. Communication: Improving system channels

Organizations that operate from multiple locations typically experience communication challenges, and Lambton County Library is no exception. Furthermore, there is a feeling of pride and unique identity within each branch of the Library that may cause a “silo-ing” effect in terms of cross-system awareness.

Given the extensive change that will be experienced by library staff and community members, it is imperative that the Library have several methods of communicating these changes in a timely, consistent manner, in multiple formats and over the duration of the next decade.

It is recommended that the communication systems be assessed and improved to promote the successful implementation of the community-led librarianship model. This must include developing an internal communication channel that can reach or selected staff in a timely and comprehensive way. This will need to be consistently monitored, and allow responses to issues and recognition and acknowledgement of employees for their contributions. For example, an alternative dispute resolution could be introduced so that matters of concern can be brought forward by staff to be addressed by management.

The library enjoys valuable relationships with local media. Unfortunately, the current website was found to be a barrier to communication: it is difficult to navigate, whether from a home computer or mobile device. There are many examples of libraries that have excellent websites that provide a great deal of information, easy access to the catalogue and two-way communication with the community.

Additional considerations

Communication of project results to stakeholders

As part of this project, we have had the good fortune to have rich conversations with many passionate library users and county citizens, as well as current staff. There is a true desire and need from each of these groups to know of the results and progress of community-led librarianship in Lambton. It is recommended that, as quickly as possible, the County provide a version of this report and corresponding decisions in a form that is accessible to all branches and local municipalities.

Community library outreach coordinator role: Repositioning Lambton County Library as community catalyst

The adoption of community-led librarianship and the recommended implementation plan provides the opportunity for Lambton County Library to become a valuable community partner and agent of change. Lambton County Library has the opportunity to move away from a traditional organization that delivers top-down-directed programs and services, to a connected, inclusive and collaborative partner that municipalities, community and groups engage and support. For this reason, within the recommendations made in this report, there has been an intentional focus on congruency with the County of Lambton's Strategic and Cultural Plans, and a key strategic recommendation to initiate this shift through the introduction of a community library outreach coordinator. The vision of this new position is to provide a collaborative liaison with local municipalities, designed to connect library strategy with the recreational, cultural and community goals specific to each municipality. As the library system initiates its evolution into community-led librarianship, a community library outreach coordinator will begin immediately to assess community need, form relevant partnerships, and generally support the creative and cultural goals of the local municipalities. See the sample job description for this position in Appendix M.

Planning ahead for 2017

In 2017, Canada celebrates 150 years of Confederation. Many organizations are planning ahead expecting that there will be multiple opportunities for funding and grants related to building infrastructure and moving innovative projects forward. It is recommended that Lambton County Library begin preparing for opportunities in which the directions and outcomes of community-led librarianship will be a fit for these opportunities.

Budget

As the scope of this project focused on providing a strategic opportunities framework – on how the library system thinks, how it works and how it can evolve to strategically meet community need and become a thriving network of community and cultural hubs – rather than an operational implementation or organizational restructuring plan, a detailed budget has not been included in this report. Decisions relative to strategic report recommendations (including the restructuring of the management team, introduction of new staff roles, and the implementation of pilot programs suggested in the “Top 10 engagement opportunities” section) will involve in-depth planning and analysis, and a detailed implementation action plan, including budget priorities, by year. The consultants were intentional in not being prescriptive about budget for this reason, and, because of the very nature of community-led librarianship. In order to be truly community-driven and community-responsive, decisions about investments must be made in collaboration with, and support from, the community itself. This includes the development of partnerships to support recommended pilot project (e.g. local business sponsorship of a Maker Lab for youth).

CONCLUSION

“During economic downturns, it may be tempting to take the easy path and revert to our old ways of working. However, the relevancy of the library service is directly related to its relevance to the public tax base and the local communities in which it functions. Continuing to work without innovation to ensure community needs are correctly understood and addressed, in the same way as lack of innovation in the private sector leads to the demise of private companies, may ultimately lead to the demise of the public library” (Pateman & Williment, 2013, p. 201).

The adoption of a community-led librarianship model will mean large-scale changes to the Lambton County Library. It will require shifts in every aspect of the Library from how it engages with the community, how it invests in programs, collections and technology, and how it measures success, to the core competencies and range of service provided by staff to users. Yet, with adequate time, energy and resources required to make this shift, Lambton County Library can position itself as a continuing leader of innovation in the Canadian library landscape, a community partner that is seen as “enduringly relevant,” and a local destination accessed and valued by diverse communities.

Within this report, we have offered the following recommendations to the Lambton County Library:

1. Adopt community-led librarianship using a phased implementation plan over the next decade. Take steps to proactively remove identified barriers to success, which include ensuring the right people are in the right place to manage this organizational change, implementing the new role of community library outreach coordinator, and improving existing internal and external communication channels across the system.
2. Continue the community engagement that has begun with this project. Focus on the list of “Top 10 Priorities and Low-Hanging Fruit” as a starting point while developing a systematic way to collect and respond to information that comes via community conversations.
3. Develop a plan to communicate the results of the Library Strategic Capacity Plan project to the community and all staff (beginning with those who participated in the forums and offered other contributions to the project)
4. Create opportunities to take advantage of potential 2017 infrastructure investment, which is expected in connection with Canada’s 150th anniversary of Confederation.

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The consultants wish to acknowledge the Project Steering Team, including:

Angela Scafe, *Adult Services Supervisor*

Greer Macdonell, *Children's Services Coordinator*

Kevin Coates, *Adult Services Librarian*

Krystyna Stalmach, *Technical Services Manager*

Laurel VanDommelen, *Branch Services Manager*

Lynne Johnson, *Technical Services Clerk*

Robert Tremain, *Cultural Services General Manager*

Sue McLaughlin, *Audio-visual Clerk*

Susie Beynon, *Public Services Manager*

Terrie Core, *Administrative Service Supervisor*

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RESOURCE LIST

Pateman, J. & Williment, K. (2013). *Developing community-led public libraries: evidence from the UK and Canada*. Burlington, VT: Ashgate Publishing Company.

"Community-led Libraries Toolkit (2008) Working Together Project. Retrieved from http://www.librariesincommunities.ca/resources/Community-Led_Libraries_Toolkit.pdf"

List-serv dialogues – Ontario Library Association & Canadian Library Association

Edmonton Public Library's Community-led Service Philosophy Toolkit



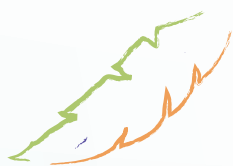
APPENDICES

Documents compiled in separate attachment to this report.

- Project Steering Team Planning Session Agenda and Presentation Deck (May 13)
- Staff Team Meeting Agenda and Presentation Deck (May 22)
- Staff Team Meeting Follow-up Memo
- Project Steering Team Planning Session Notes
- Community Forum Design and Questions
- Community Survey Questions
- Project Steering Team Meeting Agendas (June 3, July 8, July 29)
- Project Steering Team Memo (June 19)
- Staff Team Memo & Communiqué (June 19, July 13)
- County Council Presentation Deck
- Community Forum Poster
- *My Life. My Library.* London Public Library Campaign
- Community Library Outreach Coordinator Job Description
- Sample Leadership Organizational Chart
- Terms of Reference for Library Advisory Committee
- Sample Terms of Reference and Information Sources for Friends of the Library Association
- High Level Implementation Plan (organized sequentially)

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Communication and Engagement Activities – 2021 and 2022

Background

- At the Library Board Meeting held October, 18, 2021, the Board directed staff to prepare a brief overview of the promotion, advertising and marketing activities that had been undertaken in 2021, and a description of the activities tentatively planned for 2022, to the extent to which they can be known at this time.
- At the meeting, there was discussion around the amount budgeted for Advertising, Marketing and Promotion. This line item is being reduced by \$4000 in 2022. Staff explained that most of the promotional material produced can be done in-house, using the talents of staff and aided by two marketing products -- Library Aware and Canva – the latter purchased during the pandemic. When required, the County’s Strategic Communications Team is called on for their expertise and/or the services of a professional graphic designer. Communications support is invaluable, as they create media releases on our behalf which often generate interest from local media resulting in free coverage and interview opportunities. With fewer traditional media channels, some local newspapers having ceased operation, there are fewer opportunities to pursue paid advertising locally.
- Staff had informed the Board that since the onset of the pandemic, the number of active cardholders had dropped by approximately 4,000. Public libraries are seeing reduced numbers of patrons coming into the branches – typically, approximately 50 percent of normal traffic and circulation. Use of electronic resources has increased. The extent to which branch usage will return to pre-pandemic “normal”, and how long that will take, remains to be seen.
- The Board was interested in better understanding what the goal in terms of capture rate (active cardholders as percentage of population served) should be, and what potential impact marketing and advertising could have.

2020-2021 Communication and Engagement Activities

- **Existing social media accounts:**
 - From March 2020 through October 2021, 821,291 people were reached (impressions on all posts)
 - Facebook videos:

2020	168 videos posted	220,097 people reached	20,966 engagements	6,069 clicks to play
2021	188 videos posted	138,303 people reached	3,267 engagements	3,240 clicks to play

Branches have been able to remain open to the public more in 2021 than in 2020, and people have been able to return to more regular routines. In 2020, OCL Facebook videos were for a time the chief way to connect with users, and have been the sole platform for library programming.

- E-blasts (emailed newsletters)

From March 2020 through October 2021, 48 e-blasts were created and sent. This represents 451,772 emails sent to patrons with email addresses on file. One or two e-blasts are sent out each month. Limiting the number helps prevent oversaturation, and unsubscribe numbers are monitored.

Approximate number of emails sent each e-blast: 10,500

- **Website**

- Throughout the pandemic, ocl.net has remained current with hours, contact information, access to the web catalogue, and communications about restrictions and safety measures in place.

Website hits	2020	2020
January	12,801	13,770
February	16,217	12,716
March	13,531	14,048
April	9,146	13,533
May	9,128	12,116
June	11,506	12,949
July	12,349	13,416
August	12,039	13,185
September	12,134	12,606
October	12,702	13,402
November	11,622	
December	11,199	
TOTAL	144,374	131,741

- **Posters, brochures, flyers**

- Window displays at branches to attract passersby, advertise online programs, offer community scavenger hunts and other passive programming
- Bookmarks, flyers, brochures distributed at curbside
- Where permitted, branch staff posting promotional materials at community locations, e.g post office

Cautious approach taken with print materials – throughout much of the pandemic, no paper flyers or other advertisements were made available for distribution due to concerns over surface contact transmission

- **Local media – newspaper, radio and television**

- Woodstock Sentinel Review coverage and Heart FM coverage
Various OCL staff have been interviewed by the newspaper and on Heart FM to promote programs and services including: Oxford Reads, Teen Photography contest, COVID-19 services
- Rogers Cable TV coverage
Sarah McDonald appeared on Rogers TV twice in 2021 to promote Oxford Reads

- **New Initiatives**

- myaccount@ocl.net
Established shortly after the onset of the pandemic, when branches were closed, to assist patrons whose accounts needed to be renewed, who had forgotten their PIN, or to set up a person with an OCL account.
Ongoing – monitored 7 days per week by staff
- curbsidebooks@ocl.net
Once branches were able to introduce curbside service, this email was established to help patrons put holds on items and offer Readers Advisory service.
Ongoing – monitored 7 days per week by staff

Estimated combined usage of the two accounts:

Estimated usage	New Cards issued	Accounts renewed	Information requests
2020 (Mar-Dec)	280	60	540
2021 (Jan-Oct)	50	80	160

- **Check-in Calls**

Established in March 2021 to provide a means of connecting staff with residents who were not comfortable with/had no access to email and the Internet.

Staff member Gail Kavelman responded to phone messages from residents, usually the same day. Whereas the “myaccount” and “curbsidebooks” emails address specific and immediate needs, and issues are resolved quickly, the Check-in calls provide an opportunity to spend more time discussing residents’ needs and promote digital and enhanced library services. Gail was able to put holds on items, promote the OCL suite of online resources and products and provided tech coaching over the phone to teach the resident how to do such actions as download ebooks, access Hoopla, take an online class through Universal Class, and many more. Home Delivery service was also promoted when appropriate.

Since its inception, Check-in calls have reached approximately 87 individuals, most of those being 80 years of age and older. Many were residents who learned of the service through The Village Voice publications as well as word-of-mouth. Many have become

repeat customers, having established a connection with staff and wanting to learn more about OCL services.

With Gail Kavelman having retired recently, Thamesford Branch Supervisor Jessica Dertinger has assumed responsibility for the service.

For the Board's information, monthly tracking forms of the Check-in Call service are attached to this briefing note.

While demand for the service has declined during the past few months, as people are increasingly able to resume normal activities, it will continue to be offered. It is a unique service, meets a need, and could be further enhanced and promoted.

2021-2022 Communication and Engagement Activities currently in development

- Online Marketing Request Form
 - Sarah McDonald has developed an Online Marketing Request Form to be completed by branch staff who are planning to offer programs and events and would like online marketing support in the form of social media ads, website banners, or email blasts. With the OCL branding icons now incorporated in all marketing materials, it is helpful to have a consistent look and feel.
- Birthday card campaign
 - Credit for this idea belongs to Mount Elgin Branch Supervisor Donna Arner – sending a personalized, hand-written birthday card to young patrons of local branches. The County Strategic Communications Team has been engaged to assist in the development of a card. Children like to receive mail, but this is also an opportunity to remind children and youth of OCL services.
 - Consideration also being given to recognizing adult patrons' milestone birthdays.
- Other
 - E-blast targeted at inactive cardholders to encourage them to renew planned for New Year.
 - Rogers TV has given us an open invitation to be featured on the local cable channel, so a timeline and promotions plan will be developed. Bi-monthly segments would be a reasonable initial target.
 - Diversity, Equity and Inclusion staff newsletter being considered – to engage library staff with DEI efforts, communicate progress, determine learning needs and opportunities. If successful, could be distributed publicly.
 - Early discussions around engaging a youth member to fill role of library advocate, either as a co-op student or volunteer. Tie-ins with Teen Advisory Groups, local schools, and DEI efforts. Staff who attended the recent OLA Marketing Think Tank were inspired by Ainara, the “Junior Librarian in Residence” at Hamilton Public Library. Read about [Ainara's Bookshelf](#).

Active Cardholder Capture Rates -- observations

Capture rates for county library systems have traditionally been lower than those of their urban counterparts. Whereas a county (multi-branch, rural) system might expect to capture between 20 to 25% of its population served as active cardholders as a rule of thumb, larger urban systems can expect to capture 40 to 50%. This discrepancy can be explained in part by:

- Urban centres being the place of employment for many rural residents – convenience of using a library system in one’s work community/community of interest
- Rural transportation issues
- Persistent use of “family cards” by larger, rural families -- a parent’s card serving several family members (results in undercounting)
- OCL services institutional members. An institutional account generates larger circulation numbers serving multiple clients. We receive credit for the items circulated, but do not receive credit for the number of individuals reached. Institutional memberships include several Amish and Mennonite schools in the county, homeschoolers, and classroom teachers.

The following snapshot of capture rates is based on 2020 Ontario Public Library Statistics:

Library system	2020 Population served	2020 # active cardholders	2020 Capture rate (%)	2017 Capture rate (%)
Aurora	62,900	28,743	45.7	48.3
Caledon	74,649	13,427	18	19.4
St. Thomas	41,813	13,773	32.9	24
Stratford	31,465	7,200	22.9	27.4
Woodstock	40,902	12,282	30	31.7
Elgin County	50,069	9,587	19.1	21.9
Huron County	59,297	19,089	32.2	31.2
Lennox & Addington	42,888	7,484	17.5	20.1
Middlesex County	73,887	19,039	25.8	27.6
Stormont, Dundas & Glengarry	68,331	11,349	16.6	15.1
Region of Waterloo	75,190	15,691	20.9	23.2
Wellington County	99,200	25,491	25.7	29
Oxford County	68,077	13,896	20.4	24.8

2017 capture rates are provided for comparison purposes. Most systems have experienced a decrease in active cardholders, potentially attributable to the pandemic and the closures of public libraries for periods of time.

Prepared for: Oxford County Library Board

Further information: Lisa Miettinen, CEO/Chief Librarian
Cristina McLaren, Branch Services Librarian
Sarah McDonald, Systems Support Librarian

ATTACHMENTS

Attachment 1 – Monthly tracking forms, Check-in calls, March through July 2021
Attachment 2 – Online Marketing Request

Call #	Date	Cardholder? Y/N	New card issued? Y/N	Region (Branch - Twp - Town)	How did they learn of Check-in Call service?	OCL Service(s) Accessed / Provided	Community Services Accessed / Provided	# of Minutes on call	Call back and check back with patron
1	March 2 2021	yes	no	Zorra	Village Voice	PIN # ebooks		16	yes
2	March 2 2021	no	yes	Zorra	Village Voice	ebooks eservices	curbside pickup	38	yes
3	March 3 2021	yes	no	Ingersoll	Village Voice	Updated information		14	yes
4	March 3 2021	no	yes	SWOX	Village Voice	Press reader/ebooks		47	yes
5	March 4 2021	yes	no	Zorra	Village Voice	Kanopy/Freegal/services		31	yes
6	March 4 2021	yes	no	Zorra	Village Voice	Universal class-Law depot		28	yes
7	March 4 2021	yes	no	SWOX	Village Voice	ebooks eservices		13	no
8	March 5 2021	yes	no	Ingersoll	Village Voice	Updated information		36	no
9	March 6 2021	yes	no	Thames Centre	Village Voice	ordered books for THA		16	yes
10	March 8 2021	no	no	Zorra	Word of mouth	covid protocols/e services		11	no
11	March 8 2021	yes	no	SWOX	Word of mouth	Press reader/ebooks		9	yes
12	March 10 2021	yes	no	SWOX	repeat customer	Updated information		14	no
13	March 11 2021	no	no	Ingersoll	Village Voice	Kanopy/Freegal/services		7	no
14	March 11 2021	yes	no	Zorra	Village Voice	Hoopla/eservices		18	no
15	March 12 2021	yes	no	Zorra	Village Voice	Updated information		7	no
16	March 13 2021	no	no	Zorra	Village Voice	home delivery service Q&A		6	no
17	March 16 2021	yes	no	Zorra	Word of mouth	ordered books for THA		4	yes
18	March 17 2021	yes	no	Ingersoll	friend/family	ebooks eservices		3	no
19	March 19 2021	no	no	Zorra	friend/family	ebooks eservices		4	no
20	March 19 2021	yes	no	Zorra	Village Voice	Hoopla/eservices		5	yes
21	March 20 2021	no	no	Zorra	Village Voice	services for seniors/delivery	Thamesford Seniors Group	11	no
22	March 22 2021	yes	no	Zorra	Village Voice	pin # account updated		4	no
23	March 22 2021	yes	no	Zorra	Repeat customer	account information		6	no
24	March 22 2021	no	no	Zorra	Village Voice	Hoopla/Press Reader		17	yes
25	March 23 2021	no	no	Ingersoll	Friend/family	Online services		19	no
26	March 23 2021	no	no	SWOX	Friend/family	Account updated		11	no
27	March 24 2021	yes	no	SWOX	Friend/family	Hoopla/Kanopy/Kitchen		3	no
28	March 24 2021	yes	no	Ingersoll	Village Voice	Online services		18	no
29	March 24 2021	yes	no	Zorra	Village Voice	Printing access-forms		27	yes
30	March 25 2021	yes	no	London	Friend/family	Printing access-forms		17	yes

Call #	Date	Cardholder? Y/N	New card issued? Y/N	Region (Branch - Twp - Town)	How did they learn of Check-In Call service?	OCL Service(s) Accessed / Provided	Community Services Accessed / Provided	Time Spent with Caller
1	April 1 2021	yes	no	Zorra	Village Voice	E services/Hoopla/Kanopy		14
2	April 1 2021	yes	no	Zorra	Village Voice	Kitchen Library/Bookclubs		11
3	April 1 2021	yes	no	Zorra	Village Voice	account updates and information about curbside at EMB branch		9
4	April 2 2021	yes	no	Zorra	Village Voice	E services/Indieflix/Pressreader/mobile printing		12
5	April 2 2021	no	no	Zorra	Village Voice	E services/Hoopla/Kanopy/book clubs in the County		17
6	April 5 2021	no	no	Zorra	word of mouth	E services /Books on Audio/Newspapers available		21
7	April 5 2021	no	no	SWOX	word of mouth	E services /DIY on Facebook/stories for young children on audio		23
8	April 6 2021	no	no	Zorra	word of mouth	Readers Advisory for students online		14
9	April 6 2021	no	no	Ingersoll	friend/family	Curbside protocols and procedures at Ingersoll and Tillsonburg		28
10	April 6 2021	no	no	TAV	word of mouth	Readers Advisory for Senior in Long term care facility		16
11	April 8 2021	no	no	TAV	repeat customer	Readers Advisory for Senior in Long term care facility		5
12	April 8 2021	no	no	SWOX	Village Voice	OCL website tour and assistance with Facebook programs		9
13	April 8 2021	yes	no	Zorra	Village Voice	account updates and information about programming		11
14	April 9 2021	yes	no	Ingersoll	friend/family	account updates and information about curbside at ING branch		17
15	April 12 2021	yes	no	Ingersoll	friend/family	account updates and information about curbside at ING branch		8
16	April 12 2021	yes	no	Zorra	Village Voice	E services/Hoopla/Kanopy/Pressreader/Tumblebooks		27
17	April 13 2021	yes	no	Zorra	Village Voice	account created and books ordered for home delivery through THA		31
18	April 13 2021	no	yes	Zorra	friend/family	account created and books ordered for home delivery through THA		28
19	April 15 2021	no	no	Ingersoll	Village Voice	E services discussed		15
20	April 15 2021	no	no	TIL	friend/family	E services discussed		11
21	April 16 2021	no	no	Zorra	Village Voice	E services discussed		12
22	April 16 2021	no	no	TIL	friend/family	Curbside protocols and procedures at Ingersoll and Tillsonburg		19
23	April 20 2021	yes	no	SWOX	repeat customer	account updates online resource service information		22
24	April 20 2021	yes	no	SWOX	repeat customer	account updates online resource service information		13
25	April 20 2021	yes	no	Zorra	repeat customer	account updates online resource service information		8
26	April 20 2021	yes	no	Zorra	repeat customer	account updates online resource service information		6
27	April 22 2021	yes	no	Zorra	repeat customer	account updates online resource service information		21
28	April 23 2021	yes	no	Zorra	repeat customer	account updates online resource serrece information		14
29	April 23 2021	yes	no	Zorra	friend/family	account updates online resource serfrce information		22

30	April 26 2021	yes	no	Zorra	friend/family	account updates online resource serfrce information		25
31	April 26 2021	yes	no	Ingersoll	Village Voice	account updates online resource service information		33
32	April 27 2021	no	yes	Zorra	Village Voice	account created and books ordered for home delivery through THA		22
33	April 27 2021	no	no	Zorra	Village Voice	Curbside protocols and procedures at Thamesford and HAR		15
34	April 27 2021	no	no	Zorra	Village Voice	Curbside protocols and procedures at EMB		8
35	April 29 2021	no	no	Zorra	friend/family	E services discussed		24
36	April 29 2021	no	no	Zorra	friend/family	E services discussed		21
37	April 29 2021	yes	no	Ingersoll	friend/family	Curbside protocols and procedures at Ingersoll and Tillsonburg		9
38	April 30 2021	no	yes	Ingersoll	Village Voice	account created and Eservices discussed		17
39	April 30 2021	yes	no	SWOX	repeat customer	Eservices discussed		8
40	April 30 2021	yes	no	SWOX	friend/family	Eservices discussed		17

Call #	Date	Cardholder? Y/N	New card issued? Y/N	Region (Branch - Twp - Town)	How did they learn of Check-In Call service?	OCL Service(s) Accessed / Provided	Community Services Accessed / Provided	Time Spent with Caller
1	May 3 2021	yes	no	NOR	repeat customer	Readers Advisory		43
2	May 3 2021	yes	no	Zorra	word of mouth	E services and branch information		11
3	May 3 2021	yes	no	SWOX	Village Voice	account updates and information about curbside at EMB branch		9
4	May 4 2021	no	yes	SWOX	Village Voice	Programs and updates on branch openings		14
5	May 7 2021	no	no	Ingersoll	friend/family	E services/Hoopla/Kanopy/book clubs in the County		17
6	May 10 2021	no	no	Ingersoll	friend/family	E services /Books on Audio/Newspapers available		21
7	May 11 2021	no	no	Zorra	Village Voice	E services /DIY on Facebook/stories for young children on audio		23
8	May 14 2021	yes	no	Zorra	Village Voice	Readers Advisory for students online		14
9	May 14 2021	yes	no	Zorra	Village Voice	Curbside protocols and procedures at Ingersoll and Tillsonburg		28
10	May 14 2021	no	no	Zorra	Village Voice	Assistance with Ebooks and Eservices		16
11	May 17 2021	no	no	Zorra	repeat customer	Assistance with Ebooks and Eservices		5
12	May 17 2021	no	no	SWOX	friend/family	OCL website tour and assistance with Facebook programs		9
13	May 18 2021	yes	no	Zorra	word of mouth	account updates and information about programming		11
14	May 18 2021	yes	no	Ingersoll	word of mouth	E services/Hoopla/Kanopy/Pressreader/Tumblebooks		17
15	May 21 2021	yes	no	Ingersoll	word of mouth	account updates and information about curbside at ING branch		8
16	May 25 2021	yes	no	TAV	staff recommended	Assistance with Hoopla		33
17	May 25 2021	no	yes	Zorra	Village Voice	account created and books ordered for home delivery through THA		37
18	May 27 2021	no	yes	Zorra	repeat customer	account created and books ordered for home delivery through THA		29
19	May 28 2021	no	no	Ingersoll	repeat customer	Assistance with Ebooks and Eservices		17
20	May 31 2021	no	no	TIL	repeat customer	Assistance with Ebooks and Eservices		19
21	May 31 2021	no	no	Zorra	Village Voice	Assistance with Ebooks and Eservices		11

Call #	Date	Cardholder? Y/N	New card issued? Y/N	Region (Branch - Twp - Town)	How did they learn of Check-In Call service?	OCL Service(s) Accessed / Provided	Community Services Accessed / Provided	Time Spent with Caller
1	July 5 2021	yes	no	Zorra	repeat customer	Readers Advisory		38
2	July 8 2021	yes	no	Zorra	word of mouth	Hoopla Press Reader Kanopy		22
3	July 9 2021	yes	no	Zorra	repeat customer	E services and branch information		23
4	July 13 2021	yes	no	SWOX	repeat customer	Readers Advisory		34
5	July 13 2021	yes	no	SWOX	repeat customer	Readers Advisory		37
6	July 17 2021	yes	no	TAV	staff recommended	E services and branch information		21
7	July 19 2021	yes	no	TAV	staff recommended	Readers Advisory		23
8	July 19 2021	yes	no	SWOX	repeat customer	Readers Advisory		24
9	July 22 2021	yes	no	Ingersoll	friend/family	Readers Advisory		29
10	July 23 2021	yes	no	Ingersoll	friend/family	Readers Advisory		36
11	July 23 2021	yes	no	Zorra	Village Voice	Assistance with Ebooks and Eservices		25
12	July 27 2021	yes	no	Ingersoll	repeat customer	Hoopla Press Reader Kanopy		24
13	July 27 2021	yes	no	Zorra	repeat customer	Hoopla Press Reader Kanopy		19
14	July 29 2021	yes	no	Zorra	repeat customer	E services/Hoopla/Kanopy/Pressreader/Tumblebooks		21
15	July 29 2021	yes	no	Zorra	repeat customer	set up Hoopla and Press Reader and Kanopy accounts		34
16	July 30 2021	yes	no	TAV	staff recommended	Assistance with Hoopla		16
17	July 30 2021	yes	no	TAV	Village Voice	Readers Advisory		31
18	July 31 2021	yes	no	Zorra	repeat customer	Readers Advisory		27
19	July 31 2021	yes	no	Zorra	staff recommended	Readers Advisory		25
					10 repeat customers			

Online Marketing Request

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Website Banner

Lead time needed to create a website banner promotion is at least one week.

Do you want your program promoted on the [ocl.net](#) homepage banner? *

Yes

No

If yes, starting when and for how long?

Your answer

If yes, please include a description for the website banner. Keep your description to 180 words or less.

Your answer

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Email Blast

Lead time needed to create social media promotion is at least two weeks

Do you want your program promoted through an email blast to all OCL patrons? *

- Yes, I'd like an email blast created for this specific program/event
- Yes, I'd like this included in a monthly programming email
- No

If yes, when would you like the email blast to go out?

Your answer

If yes, please include all information you would like included in the email blast.

Your answer

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* Required

Press Release

Lead time needed to create social media promotion is at least one month.

Does your program or event need a press release issued by County Communications? If yes, I will follow up with you about this. *

Yes

No

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- Newspaper Ad
- No

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