

Report to/Rapport au:

**OTTAWA PUBLIC LIBRARY BOARD
CONSEIL D'ADMINISTRATION DE LA BIBLIOTHÈQUE PUBLIQUE D'OTTAWA**

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SUBJECT: Library of the Future Final Report and Strategic Plan Refresh

OBJET : Rapport final sur le projet Bibliothèque du futur et actualisation du plan stratégique

REPORT RECOMMENDATIONS

That the Ottawa Public Library Board receive this report as the final piece in the Library of the Future project reporting; and

That the Board approve that the strategic plan be refreshed in 2014 for implementation in 2015; and

That the Board approve up to three trustees to volunteer as an ad-hoc working group to review and recommend options to refresh the current strategic plan.

RECOMMANDATIONS DU RAPPORT

Que le C.A. de la Bibliothèque publique d'Ottawa prenne connaissance de ce rapport en tant que document final de la reddition de comptes sur le projet Bibliothèque du futur;

Que le C.A. approuve l'actualisation du plan stratégique en 2014, aux fins de mise en œuvre en 2015;

Que le C.A. approuve la participation bénévole de trois administrateurs, au maximum, pour constituer un groupe de travail ad hoc chargé d'examiner le plan stratégique actuel et de recommander des options en vue de l'actualiser.

BACKGROUND

In November 2012, at the Board Governance Workshop, the Board developed a nine-point action plan as part of its governance review. One of the items under the CEO's leadership was the following:

Develop and implement a process to revise the Strategic Plan, with Board input as appropriate, that ensures the library remains relevant in the future, establishes longer-term objectives, and provides a financial assessment of the resources required and the means to obtain them, for Board review and approval.

In response to this directive, the Ottawa Public Library (OPL) established the "Transforming OPL" initiative to examine and optimize all business lines within the library, while focusing on three key areas:

1. Foundational Pieces
2. Customer Experience
3. Library of the Future

The **Library of the Future Project** was developed as a year-long process intended to gather data from key stakeholders, including Ottawa residents, Board trustees and OPL employees, on the role OPL will play over the next five years.

The **Imagine Online Ideas Campaign**, a key component of the Library of the Future Project, was designed to engage residents in an online discussion on the future of their library system. It was launched on May 15, 2013 for a four-week period.

A preliminary review of the data collected during this campaign was issued and presented at the October 15, 2013 Board meeting. Ten key findings from the *Imagine* campaign were presented:

1. Ottawa residents view the library as a physical space first and foremost, the venue “par excellence” to borrow and consult free material. Borrowing is seen as the main activity, followed by attending programs and use of technology.
2. The holds service is one of the most valued services.
3. Access to print and audiovisual material is greatly valued and is seen as a mainstay service.
4. There is a growing request for digital content, such as eBooks. However, access to digital content should not be increased at the expense of physical materials.
5. Local or community branches are highly favoured. The lack of library services in a community is seen as a barrier to access.
6. There is general consensus that the Main branch needs to be improved.
7. Hours of operation need to be expanded to include more branches that are open on Sundays and more non-traditional hours of operations.
8. The use of physical space requires that branches not only provide quiet spaces for reading and private research, but also spaces for various other uses such as collaboration, learning, and working.
9. Library branches play an important role as community hubs and places for both collaborative and individual learning. Book clubs are seen as a mainstay activity.
10. Access to public computers and free public WiFi are also central services. Outdated software and hardware on OPL’s PCs are seen as barriers to accessing services.

As part of the next steps identified in the preliminary Board report, focus group sessions were held from June to October 2013 in order to validate the ten key findings with sectors of the population who may not have been able to participate, such as teens, people with disabilities, newcomers, and marginalized populations.

DISCUSSION

Key Findings: Focus group sessions

Targeted focus group sessions and interviews were held during the summer and fall of 2013 with the following sectors of the population:

Sector	Type of consultation	Number of participants
Teenagers	Targeted focus group session	24
Aboriginals	Interviews	3
New Canadians	Targeted focus group session	14
Immigrant services providers	Targeted focus group session	22
People with accessibility issues	eMail report	1 summarizing 14 responses from the City of Ottawa Accessibility Advisory Group
Marginalized populations	Targeted focus group session	4

Analysis of the data from these focus groups sessions and interviews validates the top ten key findings and provides the following insights:

1. While borrowing is seen as the main activity, focus group participants in general felt that the bookmobile and homebound services are not well known to these communities and would be a great benefit to all.
2. Access to technology is of primary importance to many of the focus group participants.
3. Self-publishing is becoming of greater importance and participants felt that OPL should encourage, promote, and facilitate this activity.
4. The social components of library services are highly sought from focus group participants. The Library offers a safe space for participants to engage socially with others as well as develop essential skills such as language learning.

A detailed summary of the discussions is found in Appendix A.

In light of the success of this public engagement initiative, OPL senior management will continue to look for ways to maintain and create strong ties with customers to not only solicit input but also to actively collaborate in the design and delivery of its services.

Recommendations

That the Board approve that the strategic plan be refreshed in 2014 for implementation in 2015; and

That the Board approve up to three trustees to volunteer as an ad-hoc working group to review and recommend options to refresh the current strategic plan.

As per Board Policy on Strategic Planning (A.31), the Library Board "...is responsible for setting strategic direction for the library..." and the CEO is to "...work with each newly constituted Library Board to review and reaffirm the existing strategic plan during the first year of its term..." The current OPL strategic plan came into effect in 2012 and covers a 4-year period, ending in 2015.

The Board, at its November 2012 planning workshop, directed management to develop a process to refresh the strategic plan. While today's strategic directions are valid, the current plan does not contain a vision statement which is considered an essential element to drive and unite the strategic directions toward a common goal. In addition, the existing directions do not support longer-term objectives to ensure the library remains relevant into the future.

It is therefore recommended that the OPL strategic plan be refreshed before the end of the Board's term. This will leave the new Board with a relevant, future-oriented plan that is well-aligned to position the organization for the first two years of the next Board term.

The recommended 2014 refresh process features a collaborative and inclusive approach, involving OPL employees, management, and an ad-hoc Board working group. Key steps are as follows:

- Map the current strategic plan with key findings from the Library of the Future project and other data (e.g. customer satisfaction) to determine key areas of focus for the next two years.
- Revise the current OPL mission statement.
- Develop a vision statement to be used to strengthen advocacy, fundraising, etc.
- Develop 3 to 5 targeted strategic directions aligned with the vision, to guide OPL through the next 2 years.
- Develop outcomes for each strategic direction.
- Present option(s) for a refreshed strategic plan to the Board ad-hoc working group for review and discussion.
- Present a recommended option to the Ottawa Public Library Board for review and adoption.

The outcome of this initiative will be 3 to 5 focused longer-term objectives with fewer well-defined and measurable outcomes to guide the operational and financial decisions of the OPL for 2015-2016.

The proposed timing affords the newly constituted Board a one-year period in which to become familiar with the Ottawa Public Library organization before embarking on a comprehensive strategic planning process which will result in approved strategic directions for implementation in 2017.

CONSULTATION

As part of the consultation process, the Library of the Future Project and the *Imagine* Campaign received support from the Board Ad-Hoc Working Group on the Library of the Future Project which met four times in the course of the campaign period and once during the analysis phase. Members of the Working Group include Trustees Armit, Bennett, Gourlay, Wilkinson and the CEO. Various City employees were also consulted during the planning phase.

Consultations on next steps in the planning process occurred with OPL Senior Management, and the Manager, Planning and Board Support (Communications and Community Relations).

LEGAL IMPLICATIONS

There are no legal implications associated with this report.

RISK MANAGEMENT IMPLICATIONS

Two potential risks are identified:

- Less interest to participate in future initiatives if OPL does not follow-through on public input provided during the Imagine campaign.
- Difficulty in establishing priorities should the existing strategic plan not be refreshed to include a vision statement and outcomes.

ACCESSIBILITY IMPACTS

There are no accessibility impacts.

TECHNOLOGY IMPACTS

There are no technology impacts.

FINANCIAL IMPLICATIONS

Consulting fees may be incurred. Funds have been allocated in the 2014 Budget for this purpose.

BOARD PRIORITIES

The recommendation supports the OPL **Board's strategic direction C.1** Implement new ways of effectively reaching out, engaging and communicating with customers and communities about services and future Library directions.

The recommendation supports Action #3 from the Board's nine-point action plan developed out of the governance review.

SUPPORTING DOCUMENTATION

1. OPL Strategic Plan 2012-2015
2. Board Governance Review, November 19, 2012

DISPOSITION

Manager, Planning and Board Support to initiate project planning towards the refresh of the strategic plan. This will include a call for Board volunteers to serve on the ad-hoc group.

Appendix A:

Imagine Discussion groups: summary of feedback

Teens (OPL Teen Advisory Committee members): The Library's teen customers expressed a very unique set of needs. Teens exemplify the Library's future customer base and offer a glimpse into how library services will have to adapt to meet the coming years.

Teens were highly interested in sharing information with peers and learning in collaborative environments. They advocated for the expansion of the physical space dedicated to the Library's Teen Zones and the inclusion of appropriate furniture such as bean bag chairs and study tables. They were also keen to see more workshops, seminars, homework/tutoring clubs and events-based programming. Employment and job seeking programming was highly popular. Teens were often "format agnostic" when seeking information – they cared about the content and were easily able to adapt regardless of the delivery method (switching effortlessly between online database, print book, eBook or Internet site).

While the teens expressed little difficulty using technology, there were complaints regarding the speed of child-filtered Internet PCs and a lack of up to date software. They advocated strongly for an expansion of popular content such as DVDs, young adult books/eBooks and graphic novels/manga. Series with missing volumes were especially troubling.

Suggestions for new services included the lending of sporting goods, the ability to access emerging technologies (design, video/music editing, gaming and game design) and the creation of new types of spaces such as outdoor lounge areas.

Aboriginal (Minwaashin Lodge, Metis Publishing, members of the public): The idea of having Aboriginal spaces was popular in this community. Members of this group felt there were many misconceptions regarding Aboriginal peoples, and the Library could play a role in bridging divides between the Aboriginal and non-Aboriginal communities. Users could be drawn to the library to see displays of traditional art, cultural objects and performances of traditional ceremonies or dance.

Bookmobile and homebound services were especially interesting. Aboriginal communities are often hard hit by health issues and disabilities that prevent them from traveling to libraries. Increased homebound services could help not only deliver need literacy materials but help alleviate isolation. Users with mobility issues may find it easier to make short trips to nearby bookmobile stops rather than dealing with bus travel or parking.

Security and privacy are concerns, as urban Aboriginal services often cater to individuals fleeing dangerous social conditions such as abusive relationships or community violence. It is highly important that the Library provide a safe environment for those looking to access social, legal or health services. Language and literacy barriers were among the most problematic. Many Aboriginal users, particularly elders, speak neither English nor French and would benefit from ESL/FSL training. Many of these programs cater to new Canadians and Aboriginals with language needs may feel excluded.

There exists an active and robust group of Aboriginal self-publishers in Ottawa. Aboriginal stories often cater to small markets and may be written in traditional languages, making them unattractive to commercial publishers. Many Aboriginal authors have taken advantage of the rapidly growing self-publishing industry to share their works. Bringing a title to market can be very expensive and time consuming. The Library could help by offering self-publishing workshops or access to technology such as Adobe Pro and binding equipment.

Accessibility (City of Ottawa Accessibility Advisory Group): The consensus amongst this group is that the Library has done a good job providing accessible services and physical spaces. They were particularly pleased with the predominance of low book shelves which allows customers using mobility devices to easily access materials. Wide welcoming corridors and accessible computer desks were also noteworthy.

The group mentioned Ben Franklin Place (home of the Nepean Centrepointe branch) as a good example of a well designed, accessible building. Not only is the building itself designed well from an accessibility standpoint, it is located in a central, easy to get to location.

In general, the group was glad to see the Library examine accessibility issues early in the planning stages of the *Imagine* campaign.

New Canadians (Alta Vista branch ESL class): New Canadian respondents were highly invested in all library services, but held especially positive feelings for any service with a social component. The most highly prized services include language conversation groups, book clubs and board/card game clubs. All offer the opportunity to interact with friendly employees or customers. Many felt that the library offered a safe welcoming environment in which to meet new people. They were also very keen to access technology such as printers and scanners, multi-language reading materials and children's programming.

While they greatly enjoyed free services such as conversation groups and computer classes, they were disappointed that classes are often only offered at beginner levels. They are often forced to leave the library in order to pursue more advanced learning. Language classes that incorporate film showings would help newcomers with pronunciation issues and with their comprehension of slang. This group also advocated for an expansion of PC availability and an increase in daily PC booking time limits. Even though many members of this group have Internet access at home, they often prefer to work in a more social setting such as the library.

As was the case with many sectors of Library customers, many new Canadians were unaware of bookmobile services or of the existence of our homebound programs. They were highly impressed that the Library offered these services to customers who may not otherwise be able to gain access.

Immigrant Services Workers (YMCA Immigrant Services): Access to technology was highly prized in this group. Many new Canadians are tech savvy workers who possess the skills to use technology, but may experience difficulty purchasing devices of their own. Museum passes and children's programming were popular, especially for families seeking to learn about Canadian history or socialize their children in their new environment. Language learning services, especially conversation groups, were seen as a centrepiece of the new Canadian experience.

This group did express some displeasure with the long waiting periods for new materials (recently released DVDs and bestsellers). A perceived lack of availability of museum passes and Express items was seen as a barrier.

As was the case with many other groups, members of this group lacked knowledge of our homebound and bookmobile services. They found these services particularly useful

as a way to draw reluctant customers and service those who are unable to access bricks and mortar facilities. Bookmobile services were flagged as a method with which to reach users who may not have previously used libraries.

Marginalized Communities (Entraide Budgétaire of Vanier): Participants from lower-income families expressed a unique set of issues and barriers in regards to library use. Many of the clients served by service workers owe debts such as unpaid taxes or child care, or may be fleeing abusive relationships. In extreme cases, members of this group may be reluctant to expose themselves by offering identification. Security and privacy were paramount concerns.

In general, this group found museum passes, homebound services and access to Internet ready PCs to be the most intriguing OPL services. Many marginalized customers do not have access to current technology and rely on the Library to access email, read news and apply for employment.

They expressed the desire to see improved bookmobile service, more copies of recent DVDs and bestsellers and expanded branch hours. Transportation and parking costs were often cited as barriers and the group advocated for the presence of easy to get to local branches. This group was keen on seeing the Library enhance its physical spaces. They remarked that our Main branch was not the equal of central libraries in other cities such as Montreal and that it should be improved.