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Report to / Rapport au:

**Ottawa Public Library Board
Conseil d'administration de la Bibliothèque publique d'Ottawa**

October 10, 2023 / 10 octobre 2023

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File Number: OPLB-2023-1010-10.4

SUBJECT: Semi-Annual Performance Measurement - January-June 2023

OBJET: Cadre de mesure du rendement semestrielle – Janvier à juin 2023

REPORT RECOMMENDATION

That the Ottawa Public Library Board receive this report for information.

RECOMMANDATION DU RAPPORT

**Que le Conseil d'administration de la Bibliothèque publique d'Ottawa prenne
connaissance de ce rapport à titre d'information.**

BACKGROUND

In keeping with the *Public Libraries Act, RSO 1990, c.P.44 (the Act)*, other relevant statutes, laws, and good governance practices, the Ottawa Public Library (“OPL” or “the Library”) Board (“the Board”) retains accountability for the full range of decisions affecting the organization. The Board has decided, however, to use a policy or strategic model of governance that focuses most of the attention of the trustees on setting strategic direction and objectives, making decisions on major projects, and monitoring performance in various aspects of the organization.

The Board approved the inaugural Performance Measurement Framework (PMF) at its meeting in May 2013 (Board Report # OPLB2013-0052). The PMF ensures that Key Performance Indicators (KPI) are reviewed and re-aligned each term of the Board, with the organization's Strategic Plan and industry best practices. In June 2019, the Board approved a new Strategic Plan with one overarching statement: "By 2023, we will increase the number of active cardholders by 25 percent by improving OPL's community relevance."

The PMF monitors employees (E) and clients (C) KPIs (Key Performance Indicators) semi-annually. The list below identifies the specific measures in alignment with OPL's 2020-2023 Strategic Directions and highlights important client and employee trends. Document 1 further describes the intent for each indicator and Document 2 provides the definition as it relates to the Strategic Plan.

- Redesign Library Experience

C1. Cardholder Growth Rate (Client Experience)

C2. Total Twelve-Month-Active Cardholders (Client Experience)

- Build Capacity

E1. Average Applicants per Job Posting (Employee Experience)

E2. Employee Turnover Rate (Employee Experience)

E3. Active Cardholder to Full-Time Equivalent Ratio (Employee Experience)

E4. New Employee Referral Ratio (Employee Experience)

- Promote OPL's Value

C3. Economic Benefit per Cardholder (Client Experience)

C4. New Cardholder Referral Ratio (Client Experience)

Measurement groups (C1-C4 and E1-E4) comprise a strategic view of important facets of client and employee journeys. Clients and employees are central to the Library's Vision and Mission and are the focus of the KPIs. This information was necessary to

inform strategic decision making and marked a shift away from traditional Library metrics and toward strategic indicators, in alignment with the governance model.

Indicators C1 and E1 represent early touch points in the client and employee experience. Both KPIs focus on activation and acquisition to assist in evaluating if OPL is attracting new clients and employee candidates. Understanding changes in these measures can inform decision making as the library redesigns the experiences of clients and employees and builds capacity. “Cardholder Growth Rate (C1)” measures the activation of new cardholders as a percent change in comparison to the same period in the previous year. “Average Applicants per Job Posting (E1)” provides critical information about the acquisition of OPL candidates based on job postings.

Once visitors or candidates become cardholders or employees, monitoring retention becomes critical to ensure that OPL continues to provide valuable public services to clients and retains valuable skills and knowledge on the employee side. “Total 12-Month Active Cardholders (C2)” includes any client who used online resources or physical services at least once in the previous 12-month period. “Employee Turnover Rate (E2)” provides an indication of whether permanent or part-time employees leave within a period of less than two years (referred to as regrettable turnover).

As clients continue to use services, economic benefit is created for the cardholder, community, and residents. Economic benefit is the estimated value generated through programs, activities, and services. Direct benefit is value created by the usage of free services provided by OPL in lieu of paid alternatives. An indirect benefit is value created through spending by OPL staff; that is, employee spending of wages at local shops and services, creating jobs and additional economic value. “Economic Benefit per Cardholder (C3)” focuses only on the direct added value clients receive. The measure accounts for traditional usage statistics related to the cardholder benefits (access to collections, registered programming, and online resources). Measure C3 is reported only in Period 2 (July-December). Period 2 reporting occurs annually each April.

Growth in clients and evolving and innovative services require adaptive staffing models. Shortages in staffing can lead to longer wait times or fewer service offerings and decrease client and employee satisfaction. “Active Cardholder to Full Time Equivalent Ratio (E3)” helps OPL understand whether staffing models are responsive to changes in the active cardholder base. The measure looks at the Total 12-Month Active Cardholder figure as a ratio of staffing Full Time Equivalent positions.

Clients and employees who stay with OPL, and who typically derive benefits from services, often promote OPL's value by word of mouth. It is important to confirm whether new cardholders or employees were referred to OPL. Referrals can be an indicator of satisfaction and efficiency, and link directly to the creation of new 12-Month-Active Cardholders. “New Cardholder Referral Ratio (C4)” and “New Employee Referral Ratio (E4)” track the percentage of clients and employees that were created based on the referral of an OPL client or employee, respectively. Both measures required the creation of new data collection methods which began in Period 1 2020 (New Cardholder Referral Ratio) and in 2023 (New Employee Referral Ratio).

This report provides the Board with a performance measurement update for Period 1 January – June 2023.

DISCUSSION

During January to June 2023 (Period 1), OPL’s performance indicator trends remained positive. The results are encouraging indicators of the organization’s recovery from the COVID-19 public health emergency that altered many of the Library’s operations. General factors influencing performance during Period 1 2023 included concerted efforts in staff recruitment, improved and adjusted hours of operation, and the continued investment in the expansion of access to eBooks and online streaming and downloadable resources.

Below are summary tables for all key performance indicators for Period 1 and Period 2. Table 1 displays and compares Period 1 2023 results to a three-year historical result for the same period. Table 2 displays the results for Period 2 (July to December) 2020 to 2023 that will be reported in April 2024. A detailed discussion and analysis for each measure for Period 1 2023 follows below.

Table 1. Period 1 (January - June) 2020 – 2023					
Code	Measure Name	2020	2021	2022	2023
C1	Cardholder Growth Rate (%)	-58.17	-73.33	599.8	67.5
C2	Total Twelve-Month Active Cardholders	231,217	232,959	188,827	228,400

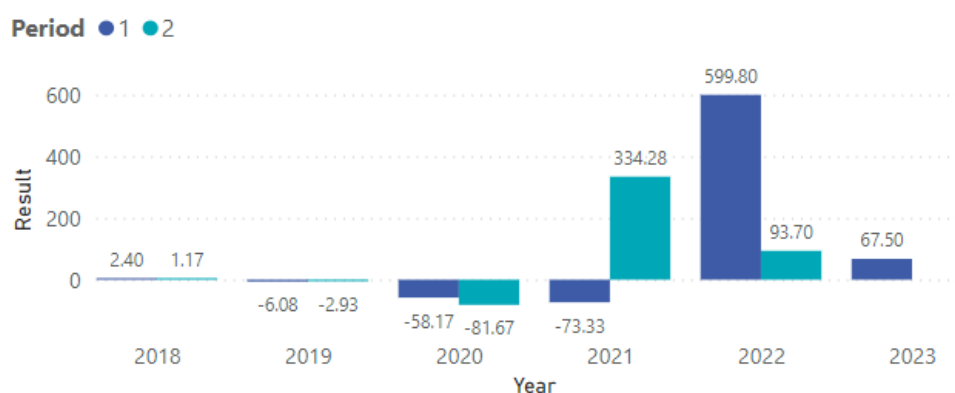
C4	New Cardholder Referral Rate	N/A	23.68	16.08	15.67
E1	Average Applicants Per Job Posting	47.04	58.04	137.52	143.01
E2	Employee Turnover Rate	0.0093	0.0040	0.0061	0.0136
E3	Active Cardholder to Full Time Equivalent Ratio	498.54	502.78	407.80	492.5
E4	New Employee Referral Ratio	N/A	N/A	0.48	0.22

Table 2. Period 2 (July- December) 2020 – 2023					
Code	Measure Name	2020	2021	2022	2023
C1	Cardholder Growth Rate (%)	-81.67	334.28	93.70	N/A
C2	Total Twelve-Month Active Cardholders	214,241	233,378	211,020	N/A
C4	New Cardholder Referral Rate	18.96	17.47	17.91	N/A
E1	Average Applicants Per Job Posting	78.00	84.64	135.71	N/A
E2	Employee Turnover Rate	0.0079	0.0074	0.0089	N/A
E3	Active Cardholder to Full Time Equivalent Ratio	461.71	505.22	447.21	N/A
E4	New Employee Referral Ratio	N/A	N/A	0.43	N/A

As described in the last Semi-Annual Performance Measurement report covering the period July to December 2022 staff implemented a new data collection approach to obtain results for the "New Employee Referral Ratio (E4)" measure. This new data collection approach has retroactively generated results for Period 1 and 2 of 2022, not previously reported on.

Client KPI Summary:

C1 – Cardholder Growth Rate



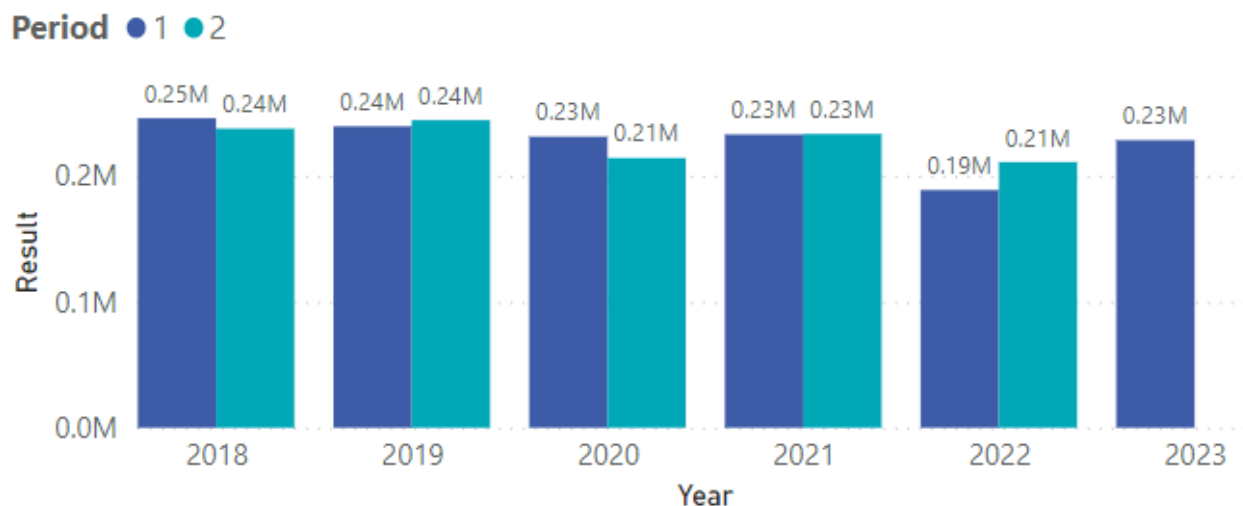
During the reporting period, the result for the measure, "Cardholder Growth Rate (C1)" was 67.5 percent and represents the creation of more than 21,000 new library cards. The measure includes only new permanent library cards; it does not include temporary cards. When compared to the same performance measurement period in 2019 (pre-pandemic), new cardholder growth rate experienced an increase of more than 3000 cards, surpassing pre-pandemic levels.

The creation of new cards during the period was facilitated by several factors that included a focus on in-branch programming and events related to Family Literacy Day, Black History Month, and March Break; optimizing hours of operation that includes full-day Sundays and improved and adjusted operational hours at some branches.

March was the most active month of Period 1 2023 with the creation of 4,204 new cardholders. January was the second most active month with 3,690 new cards created.

In-person outreach programs and special events continue to be a driving force for new cardholder creation. OPL typically sees its highest growth in new card memberships during the summer and as school restarts in the fall, and staff expect Period 2 2023 to remain consistent with historical experience.

C2 – Total Twelve-Month Active Cardholders



“Total Twelve-Month Active Cardholders (C2)” includes any account that has been accessed or updated at least once within the measurement period. Logging on to the website, card renewals, online resource usage, borrowing items, and other activities that require a card will prompt an update in the account’s last activity date. As of the end of the reporting period (June 30, 2023) there were 228,400 cardholders that were active in the previous twelve months. This result represents a growth of more than 39,000 Active Cardholders when compared to Period 1 2022.

Since the beginning of 2023, circulation of the Library’s collection has returned to approximately 80 percent of 2019 levels, while total digital circulation (streaming and downloads) remains high and has surpassed 2019 activity levels by 20 percent.

Library programs, events, and in-person services also significantly contribute to cardholder retention. In Period 1 2023 more than 70,000 participants attended programs organized by the Library when compared to Period 1 2022. It is important to note that provincially mandated in-person capacity restrictions were a cause of the lower attendance rates in 2021 and 2022. Although the usage of other in-branch library services such as access to public computers and Wi-Fi have increased and continue to climb from 2021, total usage remains below pre-pandemic measurement periods.

The significant overlap between clients using OPL’s physical and digital services demonstrates the collective importance of access to physical spaces for leisure and study; access to reliable and modern technology; and how positive client experience

from knowledgeable and welcoming staff contribute to lasting community connections and cardholder retention.

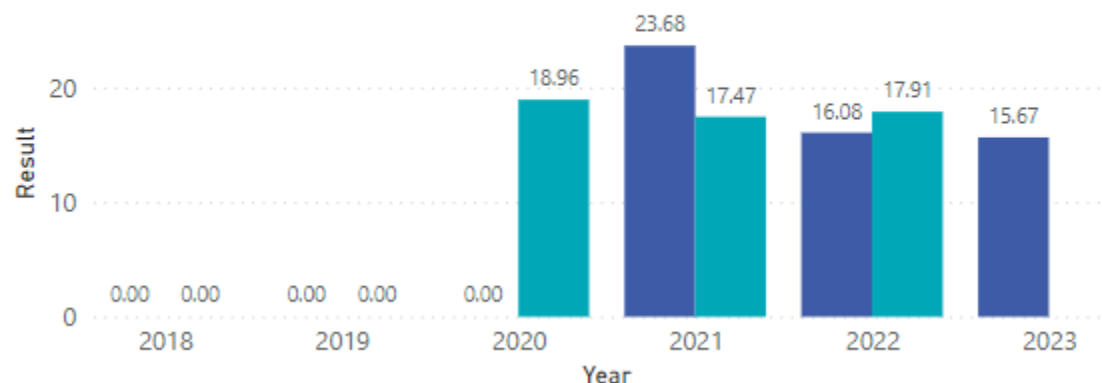
C3 – Economic Benefit per Cardholder

As noted above, the measure “Economic Benefit per Cardholder (C3)” is reported annually in the Period 2 PMF report brought forward to the Board in April of each year.

C4 – New Cardholder Referral Ratio

New Cardholder Referral Rate

Period ● 1 ● 2



During the reporting period, the result for the measure “New Cardholder Referral Ratio (C4)” was 15.67 percent. Client referral information is provided on a voluntary basis by clients during online or in-person registration. During the reporting period there was a decrease in client referrals when compared to previous periods.

In Period 1 2023, approximately 15.67 percent of new cardholders responded yes to this question during registration. In total, 3380 respondents said “Yes”, 4,209 said “No”, and 13,984 new clients either responded no or were recorded as having responded no. Null, or N/A responses are counted and treated as “No.” Factors such as question skipping during card creation produce blank responses and have been excluded from the result.

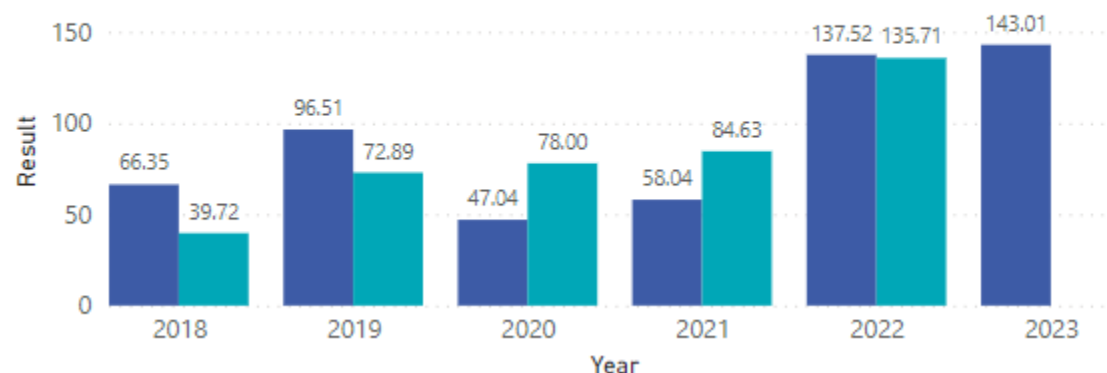
Despite the data collection challenges described above, which are common with surveying data, general patterns of usage can still be derived from these results. A decrease in referral rates may correlate with fewer account renewals and lower

cardholder retention, while higher referral rates can be an indicator of active and highly satisfied clients who are more likely to be long-term users. OPL is currently investigating ways to increase the number of respondents to help improve the sample size and reliability of the measure.

E1 – Average Applicants Per Job Posting

Average Applicants Per Job Posting

Period ● 1 ● 2



In Period 1 2023, the “Average Applicants per Job Posting (E1)” increased to 143. There were 68 job opportunities that resulted in 9,725 total applicants, 525 internal and 9200 external. The number of applicants represents all individuals who applied, including those not screened out and does not represent candidates who progressed to the final stages of the competition.

The result for the period is indicative of a continued trend that began in 2021 showing a strong interest in employment with OPL, consistent efforts by staff to fill available positions and indicative of an increasing unemployment rate in the city of Ottawa in 2023¹). The consistently increasing number of applicants can be attributed, in part, to

¹ Statistics Canada. (2023). *Table 14-10-0354-01 Regional unemployment rates used by the Employment Insurance program, three-month moving average, seasonally adjusted.*
<https://doi.org/10.25318/1410035401-eng>

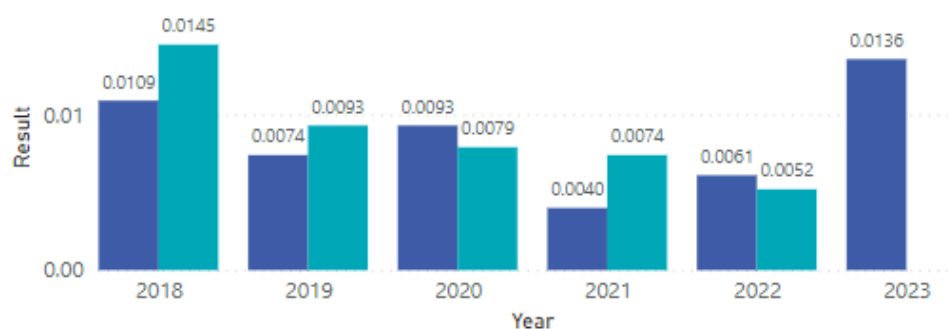
the online recruiting platform which simplifies the application process, as well as a particularly elevated level of recruiting activity compared to previous periods.

The Library is currently investigating ways to obtain information on candidates that proceed further in the recruitment process to better support the analysis of the measure.

E2 – Employee Turnover Rate

Employee Turnover Rate

Period ● 1 ● 2



The Employee Turnover Rate is an indicator of regrettable turnover. This rate is defined as permanent employees who have been with the Library for two years or less upon resignation. During Period 1 2023, the measure “Employee Turnover Rate (E2)” increased from 0.0052* to 0.0136 and is comparable to Period 2 2018 results. There were five permanent part-time and three permanent full-time individuals who met this criterion during the reporting period, as compared to a total of 589 employees (headcount). Period 2 2022 saw three Permanent Part Time individuals leave the organization, resulting in 582 employees (headcount).

Historically, OPL has a low regrettable turnover. Period 1 2023 had a higher than usual Employee Turnover Rate compared to recent periods. High employee turnover rates can reflect recent organizational changes, environmental factors, or job satisfaction challenges that reduce employee retention.

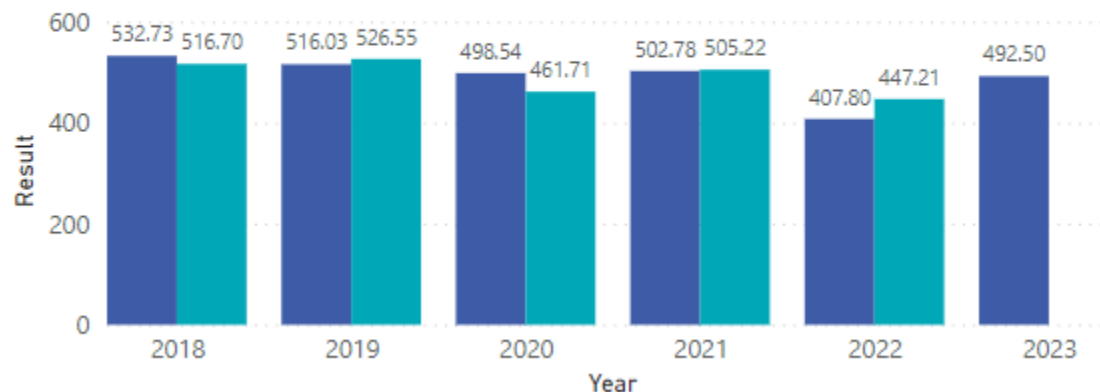
*Note that the Employee Turnover Rate in Period 2 2022 the calculation (0.0089) was inaccurate (calculation error) and has since been adjusted to the correct rate (0.0052),

reflected in the above table. Period 2 2022 saw three Permanent Part Time individuals leave the organization, resulting in 582 employees (headcount).

E3 - Active Cardholder to Full Time Equivalent Ratio

Active Cardholder to Full Time Equivalent Ratio

Period ● 1 ● 2



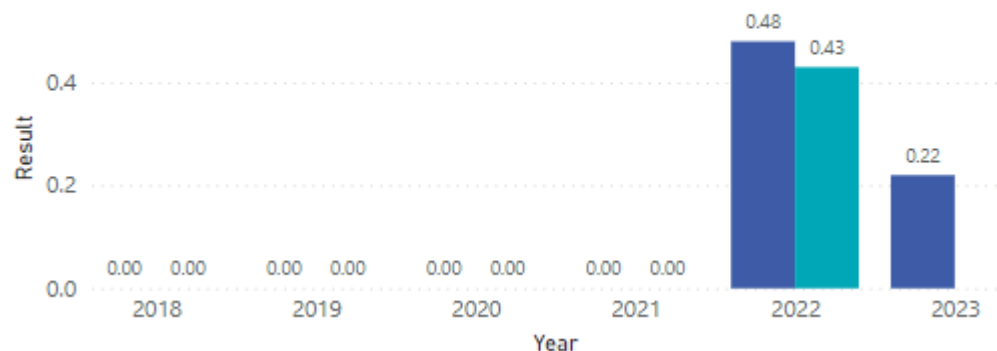
During Period 1 2023, “Active Cardholder to Full-Time Equivalent (FTE) Ratio (E3)” increased from Period 2 2022. FTEs are the metric through which the Board may be asked to approve additional employees or positions and are more directly relatable to finance. A decrease in the measure “Active Cardholder to Full-Time Equivalent Ratio (E3)” can be attributed to either an increase in FTE’s or a decrease in active cardholders which is described above in section C2.

During this period, OPL experienced continued growth in new memberships, active cardholders, and FTEs. Continued efforts in recruitment decreased the number of vacancies across the organization, facilitating improved and expanded Library services to the community. As at June 30, the number of active cardholders increased at a greater rate than FTE’s which resulted in an increased average value of 492 active cardholders per FTE.

E4 – New Employee Referral Ratio

New Employee Referral Ratio

Period ● 1 ● 2



The measure “New Employee Referral Ratio (E4)” reports on the percentage of new hires referred by OPL employees. High referrals drive growth and can be indicative of employee engagement. As described in the last Semi-Annual Performance Measurement report covering the period July to December 2022 staff implemented a new data collection approach to obtain results for the “New Employee Referral Ratio (E4)” measure. This new approach has retroactively generated results for Period 1 and 2 of 2022, not previously reported.

During Period 1 2023, the measure “New Employee Referral Ratio (E4)” was 22 percent. A decreased result when compared to the same period in 2022 (48 percent) and Period 2 2022 (43 percent). It is important to note that this KPI will benefit from more reporting periods to potentially establish a more recognizable pattern and subsequent impact on employee experience decisions.

CONSULTATION

The development of this report required internal consultations to interpret the data based on activities during the period, and to determine compensatory actions that may be taken to improve services and measurement results.

ACCESSIBILITY IMPACTS

Ottawa Public Library supports and considers the *Accessibility for Ontarians with Disabilities Act, (2005)* in its operations. There are no accessibility impacts associated with this report.

BOARD PRIORITIES

This report is prepared in compliance with OPL Board Policy OPLB-0010 CEO Reporting and Board Monitoring.

BUSINESS ANALYSIS IMPLICATIONS

There are no business analysis implications associated with this report.

FINANCIAL IMPLICATIONS

There are no financial implications associated with this report.

LEGAL IMPLICATIONS

There are no legal implications associated with this report.

RISK MANAGEMENT IMPLICATIONS

There are no risk management implications associated with this report.

TECHNOLOGY IMPLICATIONS

There are no technology implications associated with this report.

SUPPORTING DOCUMENTATION

Document 1 – KPI Alignment Diagram

Document 2 – Customer and Employee KPI Definitions and Rationale

DISPOSITION

The next Semi-Annual Performance Measurement Report will be brought to the Board in April 2024 and will present results from Period 2 2023 (July 1 to December 31).