

# 11.4

**Report to / Rapport au:**

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

**April 9, 2024 / 9 avril 2024**

**Submitted by / Soumis par:**

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**File Number/Numéro du dossier: OPLB-2024-0409-11.4**

**SUBJECT: Semi-Annual Performance Measurement – July to December 2023**

**OBJET: Cadre de mesure du rendement semestrielle – Juillet à décembre  
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**

As per the *Public Libraries Act, RSO 1990, c.P.44* (“the Act” or “the PLA”), and the Ottawa Public Library (“OPL” or “the Library”) Board (“the Board”) Policy 010 OPLB CEO Reporting and Board Monitoring (“the CEO Reporting and Board Monitoring Policy”) the Board requires the Chief Librarian / Chief Executive Officer to report on a variety of subjects so that the Board may effectively perform its monitoring role. The Board uses a 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. On October 10, 2023, the Board approved a refreshed Strategic Plan, valid through to 2028. Notably, the new plan includes a strengthened commitment to community development complementing the deletion of the previous strategic statement, which equated value to cardholder numbers. Instead, OPL will focus on the value of all library activities, including those which do not require a card. Staff will however continue to report on the active cardholder measure as a Key Performance Indicator as the number of active cardholders remains a critical metric by which library services can be evaluated across all service streams.

The PMF monitors employee (E) and client (C) KPIs semi-annually. The list below identifies the specific measures in alignment with OPL's 2023-2028 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 informs strategic decision making and shifts away from traditional Library metrics towards 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 if OPL is attracting new clients and employee candidates. Understanding changes in these measures can inform decision making as the library adjusts the experiences of clients and employees and builds capacity.

Indicators C2 and E2 are intended to measure retention rates once visitors and candidates become employees or cardholders. Monitoring retention is critical to ensure that OPL retains valuable employee skills and knowledge and continues to provide valuable public services to clients.

As clients continue to use services, economic benefit is created for the cardholder and the community. 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 on wages at local shops and services, creating jobs and additional economic value. Measure C3 is reported only in Period 2 (July-December). Period 2 reporting occurs annually each April.

Increase 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. Measure E3 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.

This report provides the Board with a performance measurement update for Period 2: July – December 2023.

**DISCUSSION**

Below are summary tables for all key performance indicators for Period 1 and Period 2. Table 1 displays the results for Period 1 (January to June) 2019 to 2023. Table 2 displays the current measurement period, July to December 2023 and results from 2019 to 2023 for the same measurement period.

During July to December 2023 (Period 2), OPL’s performance indicators have returned to near normalcy with result values close to pre-pandemic levels. This is a remarkable achievement considering the challenges that staff and clients faced in the previous three-year period. Major factors that contributed to this success were the reintroduction of programs, in-person visits and online borrowing.

The below tables are followed by discussion and analysis for each result in Period 2.

<b>Table 1. Period 1 (January - June) 2019 – 2023</b>						
<b>Code</b>	<b>Measure Name</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>
<b>C1</b>	Cardholder Growth Rate (%)	-6.08	-58.17	-73.33	599.80	<b>47.20</b>
<b>C2</b>	Total Twelve-Month Active Cardholders	239,390	231,217	232,959	188,827	<b>228,400</b>
<b>C4</b>	New Cardholder Referral Rate	N/A	N/A	23.68	16.08	<b>15.67</b>

<b>E1</b>	Average Applicants Per Job Posting	96.51	47.04	58.04	137.52	<b>143.01</b>
<b>E2</b>	Employee Turnover Rate	0.0074	0.0093	0.0040	0.0061	<b>0.0136</b>
<b>E3</b>	Active Cardholder to Full Time Equivalent Ratio	516.03	498.54	502.78	407.80	<b>492.5</b>
<b>E4</b>	New Employee Referral Ratio	N/A	N/A	N/A	.48	<b>.22</b>

**Table 2. Period 2 (July - December) 2019 – 2023**

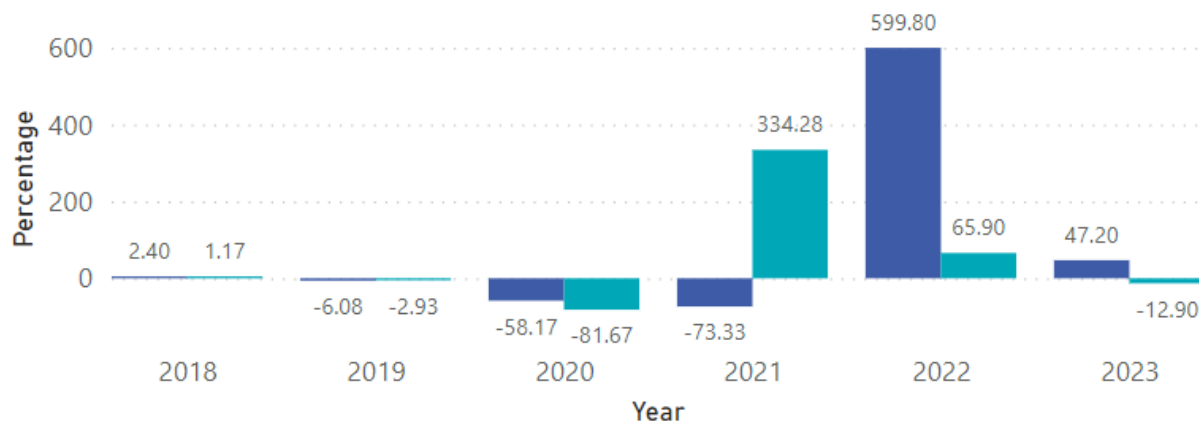
<b>Code</b>	<b>Measure Name</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>
<b>C1</b>	Cardholder Growth Rate (%)	-2.93	-81.67	334.28	65.9	<b>-12.90</b>
<b>C2</b>	Total Twelve-Month Active Cardholders	244,336	214,241	233,378	211,020	<b>244,544</b>
<b>C3</b>	Economic Benefit Per Cardholder	498.44	286.54	473.46	609.49	<b>554.40</b>
<b>C4</b>	New Cardholder Referral Rate	N/A	18.96	17.47	17.91	<b>17.42</b>

<b>E1</b>	Average Applicants Per Job Posting	72.89	78.00	84.63	135.71	<b>105.75</b>
<b>E2</b>	Employee Turnover Rate	0.0093	0.0079	0.0074	0.0089	<b>0.0115</b>
<b>E3</b>	Active Cardholder to Full Time Equivalent Ratio	526.55	461.71	505.22	447.21	<b>525.16</b>
<b>E4</b>	New Employee Referral Ratio	N/A	N/A	N/A	.43	<b>.29</b>

**Client KPI Summary:**

**C1- Cardholder Growth Rate**

Period ● 1 ● 2

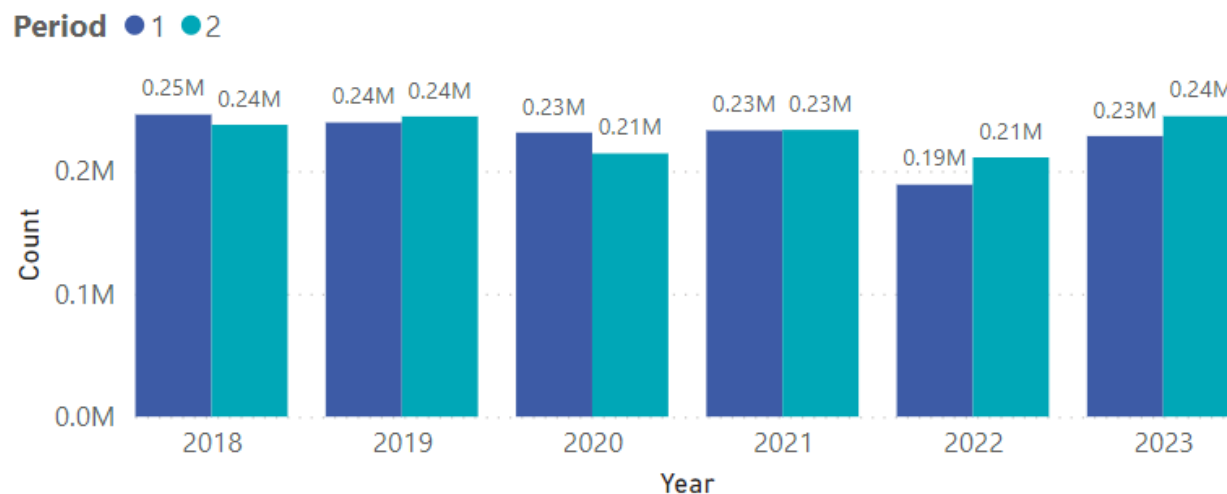


“Cardholder Growth Rate (C1)” measures the activation of new cardholders as a percent change in comparison to the same period in the previous year. The measure includes only new library cards. The measure decreased to -12.90 percent in Period 2 2023 compared to 65.90 percent for Period 2 2022. This represents 3,633 fewer new library cards.

The data shows that Adult cards were created most frequently in 2023. The number of Adult cards issued increased by 94 from 2022 to 2023, reaching a total of 16,883. This indicates a small growing demand for access to library services by adult clients.

While the total number of new library cards created did not reach pre-pandemic levels during Period 2 2023, new cardholder growth is stabilizing overall.

**C2 - Total Twelve-Month Active Cardholders**



“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. The indicator also includes any account accessed or updated at least once in the measurement period. Logging on to the website, card renewals, online resource usage, borrowing items, and other activities will prompt an update in the account’s last activity date. As of the reporting period's end (December 31, 2023), 244,544 cardholders were active in the previous twelve months. This represents an increase of 33,524 (15.89 percent) compared to the same period in 2022 and is the highest level in the preceding

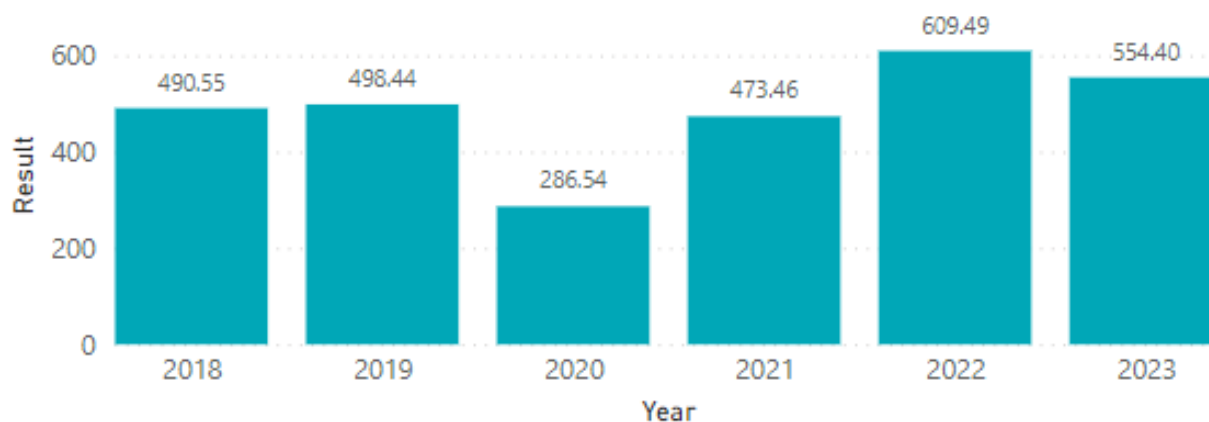
four-year period. This suggests that while new cardholder rates (referenced in indicator C1 above) may not have completely recovered, cardholder retention remains strong.

Over the past four measurement periods (two years), Total Twelve-Month Active Cardholders experienced a surge that strongly suggests the result of a full year of in-person programs, full-day Sunday hours, and remarkable levels of online use (including eBook and eAudio borrowing, and use of streaming services, among other online resources). Overdrive, the primary online borrowing platform used by OPL, experienced an increase of 11.81 percent in checkouts in 2023 compared to 2022. Kanopy, a streaming service that provides access to films and documentaries saw a 29.55 percent increase in use compared to 2022.

### C3 - Economic Benefit per Cardholder

#### Economic Benefit per Cardholder

Period ● 2



The measure “Economic Benefit per Cardholder (C3)” is reported annually in the Period 2 PMF report. This indicator focuses only on the direct added value clients receive by using library services such as collections, programming, and online resources. The economic benefit per active cardholder for 2023 was \$554.40. This is a decrease from 2022 (\$609.49). The decrease is the result of an increase in Total Twelve-Month Active Cardholders and a slight increase in overall circulation. The decrease in economic benefit is noteworthy and must be considered within the context of the economic state in Canada, including inflationary pressures and the associated rising costs of living. Inflation increased by 1.8 percent which was significantly lower than in 2022 when it was 6.8 percent. This affected primary value calculations which include equivalencies



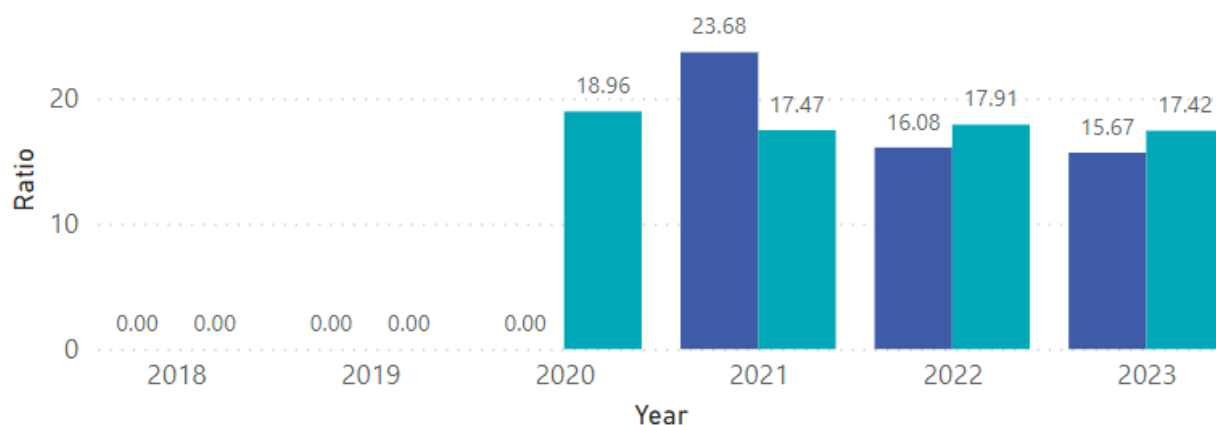
for borrowing books from OPL's physical and digital collection and downloading and streaming movies and music. The balance of the benefit calculation is divided between the value equivalency of the other library services including programming, Wi-Fi usage, and the number of holds delivered, etc.

The factors that have contributed to this positive outcome also include the continued investment in, and expansion of, access to OPL's physical and digital collections, programs, and services. Specifically, the biggest increase in input observed was program attendance with 180,948 attendees in 2023 compared to 80,697 in 2022, an increase of 108,178 (124.3 percent).

In 2023, OPL generated \$135M in direct benefits which continues to highlight the primary importance of circulating materials in OPL's collections, resources, programming, and other services.

#### C4 - New Cardholder Referral Ratio

Period ● 1 ● 2



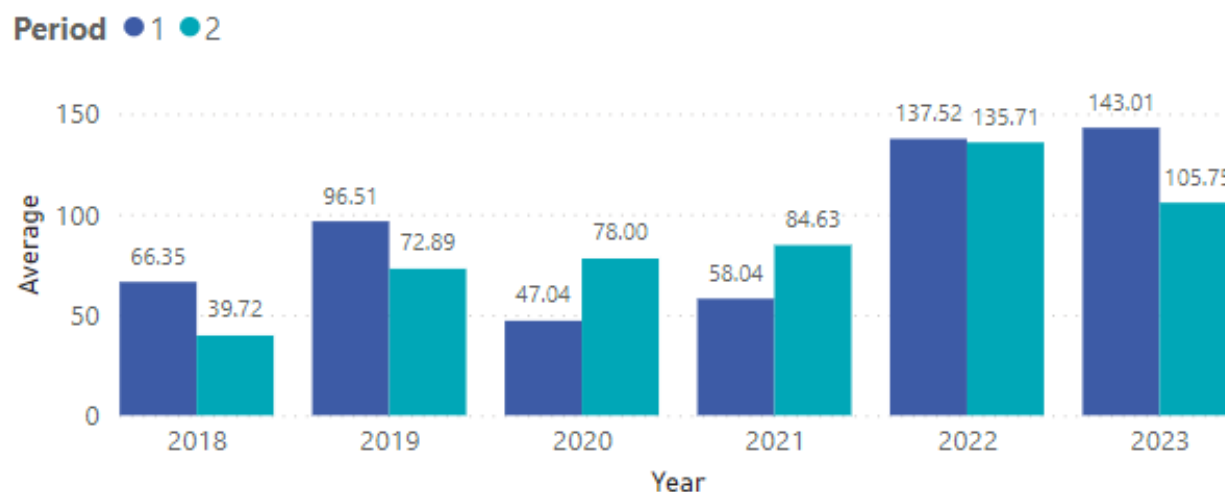
During the reporting period, the result for the measure “New Cardholder Referral Ratio (C4)” was 17.42 percent. Client referral information is provided voluntarily by clients during online or in-person registration. New members are asked if they were referred to the library. This field may also be left blank or N/A depending on the registration method. During the reporting period, client response rates increased compared to previous periods.

The referral ratio decreased slightly from 17.91 in 2022 to 17.42 in 2023, a drop of 0.49 points or 2.74 percent. However, the number of responses received increased significantly from 25,077 in 2022 to 40,116 in 2023, an increase of 59.97 percent (15,039 responses). This indicates that staff efforts have been successful in encouraging more clients to respond to the question.

Among the responses, the number of clients who said they were referred also increased from 4,493 in 2022 to 6,989 in 2023, an increase of 2,496 referrals or 55.55 percent. This means that despite the lower ratio, we have gained more potential referrals in absolute terms.

### Employee KPI Summary:

#### E1 - Average Applicants per Job Posting



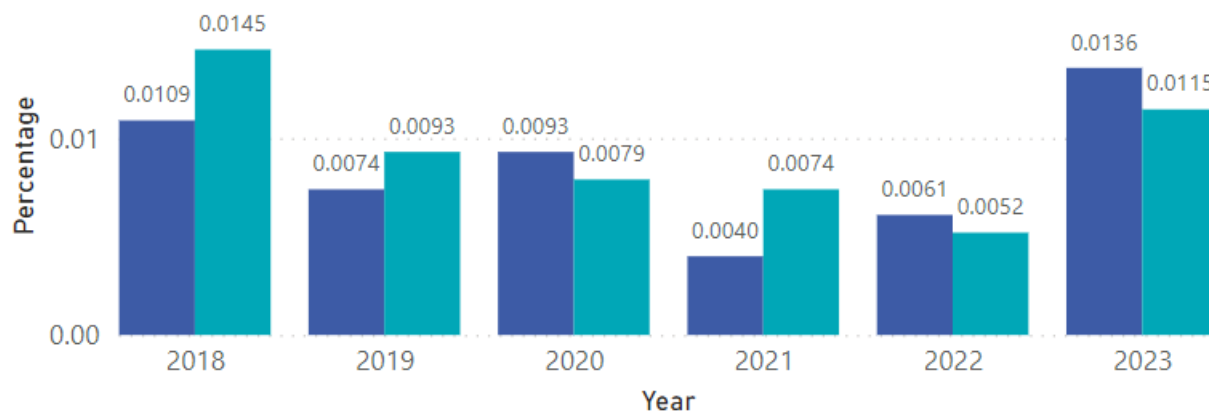
“Average Applicants per Job Posting (E1)” provides critical information about the acquisition of candidates based on job postings. During Period 2 2023, the result remained high at 105.75, however, it decreased when compared to Period 1 2023 results (143.01). In Period 2 2023, there were 59 job opportunities resulting in more than 6,200 internal and external applicants excluding candidates that were screened out due to prerequisite requirements. The result represents an elevated level of recruiting activity compared to previous periods.

Although Period 2 2023 results are lower than the past three periods, results remain indicative of an upward trend that began in 2021 with a strong interest in library jobs and a concerted effort by the organization to reduce vacancies. Furthermore, the larger than anticipated growth in the number of applicants remains attributable to the recently updated online recruitment platform.

The Library is currently investigating ways to obtain additional information on candidates that proceed further in the recruitment process to provide additional decision-making information and analysis.

### E2 - Employee Turnover Rate

Period ● 1 ● 2

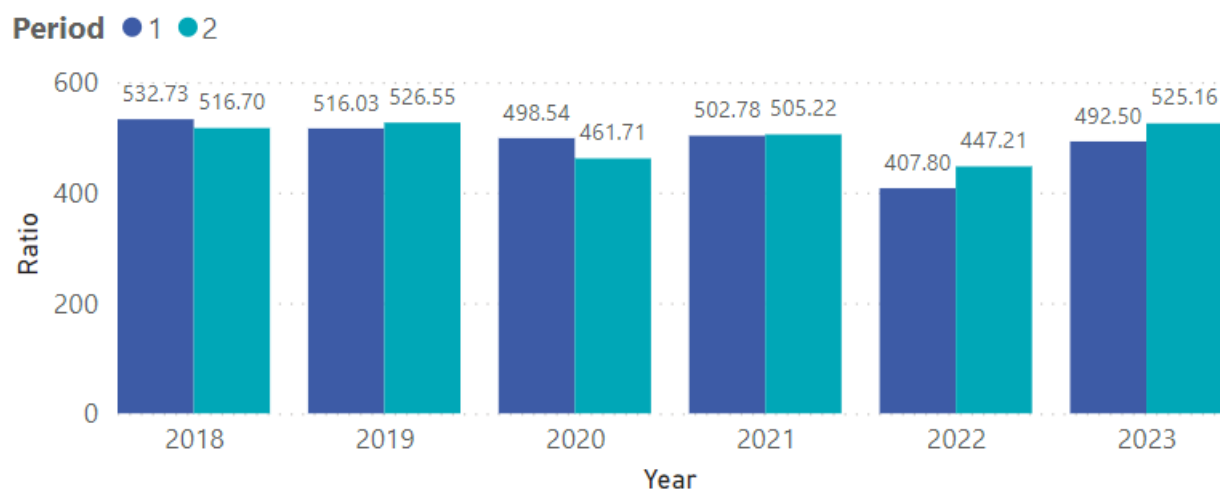


“Employee Turnover Rate (E2)” provides an indication of whether permanent or part-time employees leave within a period of less than two years (referred to as regrettable turnover). During Period 2 2023 (July to December) the measure increased to 0.0115 percent from 0.0052 percent, more than double or 121.15 percent. The employee turnover rate considers permanent full-time and part-time employees whose tenure with the organization was less than two years. Employees that left for reasons related to retirement, illness, etc. are not included in the calculation.

The headcount, or the total number of employees, also increased in 2023 to 611, compared to 582 in 2022, an increase of 29 or 4.93 percent. This increase was not enough to offset the number of employees who left the organization, which rose from three (3) to seven (7) in the same period. This represents an increase of four (4) or 133.33 percent. It is important to note that six out of seven (85.71 percent) of those

employees that left the organization were in entry-level positions, an area where the organization typically experiences higher turnover rates due to the nature of the work.

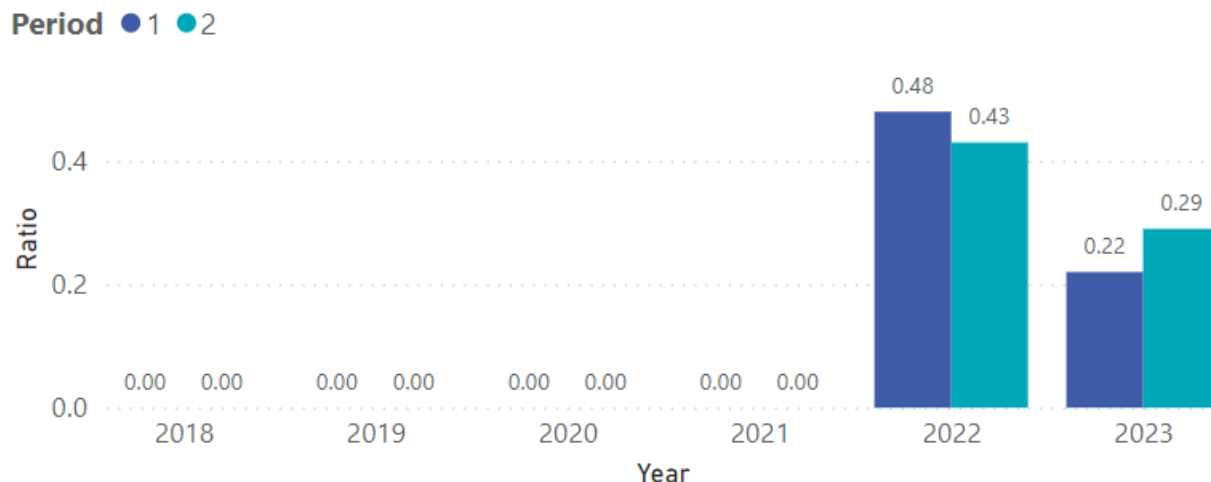
### E3 - Active Cardholder to Full-Time Equivalent Ratio



“Active Cardholder to Full Time Equivalent Ratio (E3)” helps OPL understand whether staffing levels are responsive to changes in the active cardholder base. During the measurement period the number of active cardholders per full-time employee (FTE) rose significantly, reaching 525.16 from 447.21 in the same period of the previous year. This indicates a 17.43 percent increase in organizational capacity utilized to provide library services across the city. This trend indicates a higher demand for library services and a greater opportunity for staff to interact and provide service to OPL clients in a positive way.

Period 2 2023 saw a decline in the number of FTEs to 465.65 which is a reduction of 6.21 or a 1.32 percent from the same period in 2022. In contrast, the number of active cardholders rose by 33,524, a 15.89 percent increase from the same period in 2022. These figures indicate a change toward renewed regularity of library card usage during this measurement period.

### E4 - New Employee Referral Ratio



The “New Employee Referral Ratio” measures how many newly hired employees were referred to OPL by existing employees. During each measurement period a survey including the referral question and other related HR questions about the hiring and onboarding process is sent to all newly hired employees. The survey for this period was sent to 46 new employees. In total, 28 responses were received, up from 21 in the same period in 2022. The ratio of those responding they were referred compared to the overall newly hired employee total dropped to 29 percent, down from 43 percent in the same Period in 2022, a 32.56 percent decrease.

More data and additional years of monitoring this KPI will be required to establish a benchmark ratio for the Library. Both higher and lower results have associated risks, for example higher results may point to a homogenous workforce and low results may point to lower employee engagement. This measure was reintroduced in Period 2 2022 and will continue to be analyzed and assessed for future reports.

### CONSULTATION

The development of this report required internal consultations to determine influencing factors and conditions on the results and potential next steps to be taken by staff to improve services and measurement results.

## **ACCESSIBILITY IMPACTS**

Ottawa Public Library complies with 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**

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

## **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 October 2024 and will present results from January 1 to June 30, 2024.