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Report to / Rapport au:

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

October 8, 2024 / 8 octobre 2024

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SUBJECT: Semi-Annual Performance Measurement – January to June 2024

OBJET: Cadre de mesure du rendement semestrielle – Janvier à juin 2024

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 via a new strategic priority, complementing the deletion of the 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 continue to report on the active cardholder measure as a KPI as the number of active cardholders remains a critical metric by which library services can be evaluated across all service streams. The 2023-2028 Strategic Plan is intended to carry OPL past the opening of Ādisōke, and to allow time for a more fulsome review thereafter.

The PMF monitors KPIs associated with both employees (E) and clients (C) semi-annually. Appendix A further describes the intended interpretation of the Performance Measurement Framework indicators. This report provides the Board with a performance measurement update for Period 1: January – June 2024.

DISCUSSION

Table 1 shows the Period 1 2024 results and the difference compared to a four-year result for the same period.

During January to June 2024 (Period 1), OPL's performance indicators returned to values that are within regularly expected results in years prior to 2020. This is a remarkable achievement considering the challenges faced in recent years, and this demonstrates the value of OPL in a meaningful way more than any single data set. Major factors that contributed to this success were innovative programs, increased in-person membership creation, and online circulation.

Below are summary tables for the KPIs for Period 1 and Period 2. Table 1 displays the current measurement Period 1 (January to June) 2020 to 2024. Table 2 covers July to

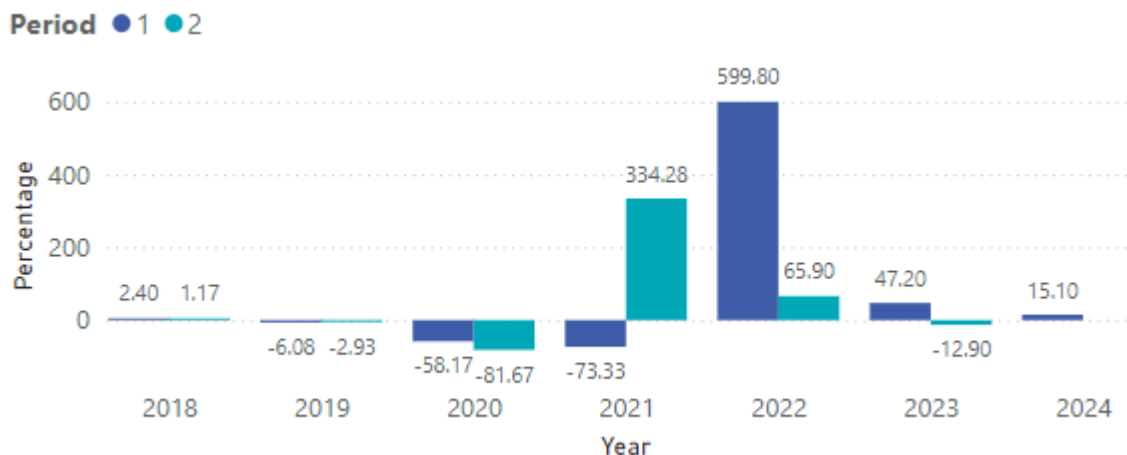
December 2020 to 2024. The tables are followed by a detailed discussion and analysis for each measure for Period 1.

Table 1. Period 1 (January - June) 2019 – 2024						
Code	Measure Name	2020	2021	2022	2023	2024
C1	Cardholder Growth Rate (percent)	-58.17	-73.33	599.80	47.20	15.10
C2	Total Twelve-Month Active Cardholders	231,217	232,959	188,827	228,400	233,196
C4	New Cardholder Referral Rate	N/A	23.68	16.08	15.67	17.71
E1	Average Applicants Per Job Posting	47.04	58.04	137.52	143.01	89.74
E2	Employee Turnover Rate	0.0093	0.0040	0.0061	0.0136	0.0049
E3	Active Cardholder to Full Time Equivalent Ratio	498.54	502.78	407.80	492.5	480.62
E4	New Employee Referral Ratio	N/A	N/A	.48	.22	.48

Table 2. Period 2 (July - December) 2020 – 2024						
Code	Measure Name	2020	2021	2022	2023	2024
C1	Cardholder Growth Rate (percent)	-81.67	334.28	93.7	-12.90	n/a
C2	Total Twelve-Month Active Cardholders	214,241	233,378	211,020	244,544	n/a
C3	Economic Benefit Per Cardholder	286.54	473.46	609.49	554.40	n/a
C4	New Cardholder Referral Rate	18.96	17.47	17.91	17.42	n/a
E1	Average Applicants Per Job Posting	78.00	84.63	135.71	105.75	n/a
E2	Employee Turnover Rate	0.0079	0.0074	0.0089	0.0115	n/a
E3	Active Cardholder to Full Time Equivalent Ratio	461.71	505.22	447.21	525.16	n/a
E4	New Employee Referral Ratio	N/A	N/A	.43	.29	n/a

Client KPI Summary:

C1- Cardholder Growth Rate

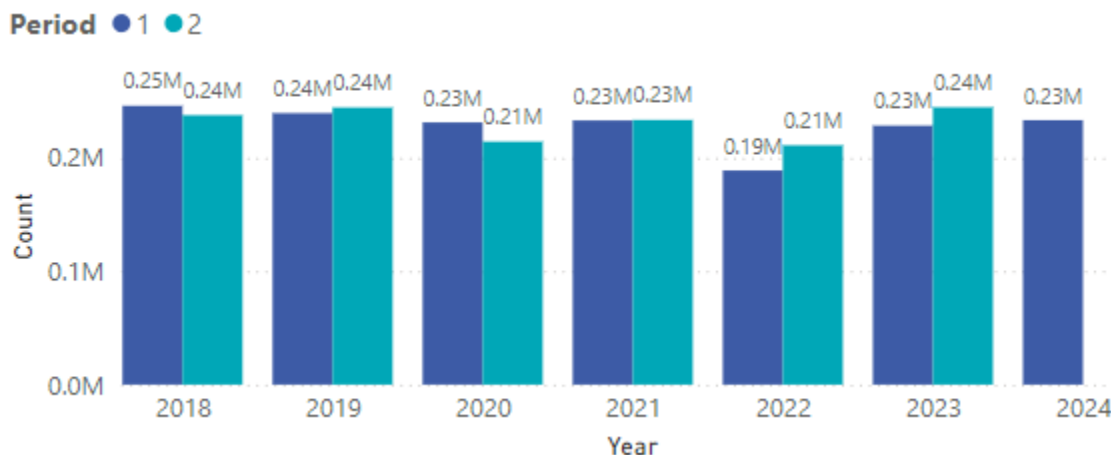


In Period 1 2024 the result for the measure “Cardholder Growth Rate (C1)” was 15.10 percent, representing the creation of more than 24,656 new library cards. Cardholder. This measure includes only the activation of new cardholders. When compared to the same performance measurement period in 2023, new cardholder growth rate experienced an increase of more than 3,000 new cardholders as at the end of June 2024.

The creation of new cards during the period primarily occurred in person at a branch or at bookmobile stop, while online registration accounted for 19 percent or a total of 4,473 new cards created.

Taken along with a stabilized Total Twelve-Month Active Cardholders measure, there is a strong indication of interest in OPL and the services it has to offer.

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 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.

At the reporting period's end (June 30, 2024), 233,196 cardholders were active in the previous twelve months. This represents an increase of 4,796 (2.06 percent) compared to the same period in 2023.

The physical circulation of library materials has shown an increase, alongside this rise in active cardholders. Comparing the first period of 2024 with the same period in 2023, there was an increase in overall physical circulation from 2,271,262 to 2,324,912 a climb of 53,650 (2.31 percent). Total digital circulation (streaming and downloads) remains high and has increased by 22 percent when compared to Period 1 2023.

These results underscore the importance of both the physical and digital collection for the community.

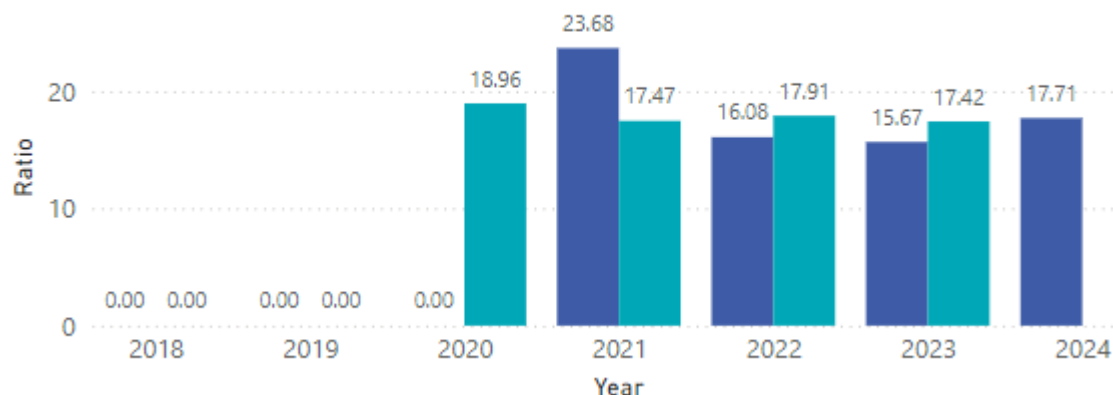
Cardholder retention during the period may have also been facilitated by regular engagement opportunities that encourage ongoing use of library resources and services.

C3 - Economic Benefit per Cardholder

This measure is only reported in Period 2 of each year. Economic Benefit per Cardholder will next be reported in April 2025.

C4 - New Cardholder Referral Ratio

Period ● 1 ● 2



During the reporting period, the result for the measure “New Cardholder Referral Ratio (C4)” was 17.71 percent, an increased result compared to the same period in 2023 of 15.67 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 or not, by responding “yes” or “no”. This field may be left blank or N/A depending on the registration method.

The number of clients who responded “yes” to being referred to the library increased from 3,781 in Period 1 2023 to 9,895 in the same period 2024, an increase of 6,114 (61.79 percent). Overall, OPL gained momentum in the measure with more new cardholders being referred to library services by another person. Higher referral rates can be an indicator of active, satisfied clients and a level of awareness of library programs and services. The indication of higher positive referral rates also supports the notion that more clients are satisfied with their library experience and are confident that other individuals in their sphere of influence will benefit from the library.

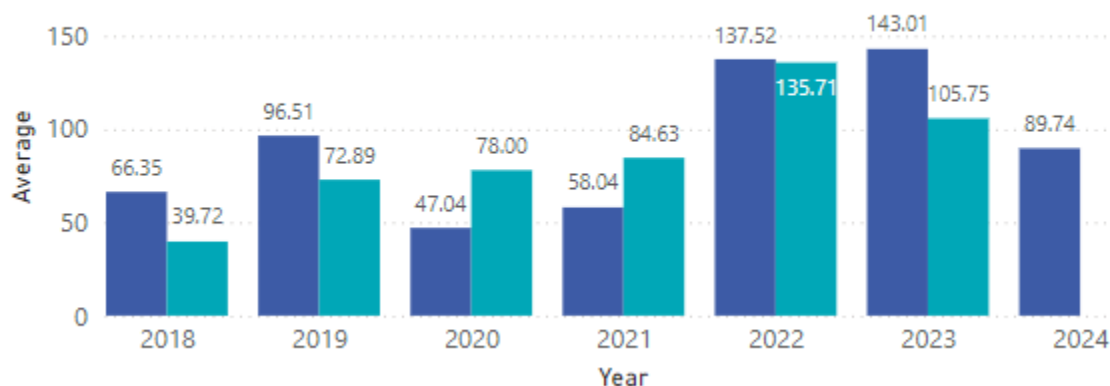
It is also noteworthy that the number of yes or no (as opposed to blank) responses increased significantly from 7,990 in 2023 to 23,682 in 2024, an increase of 15,692 (66.26 percent). This is also an indication of client trust in the organization (clients are

more willing to participate) and may also be an indicator of consistency in staff protocols, that is, asking the question at the time of new card registration.

Employee KPI Summary

E1 - Average Applicants per Job Posting

Period ● 1 ● 2

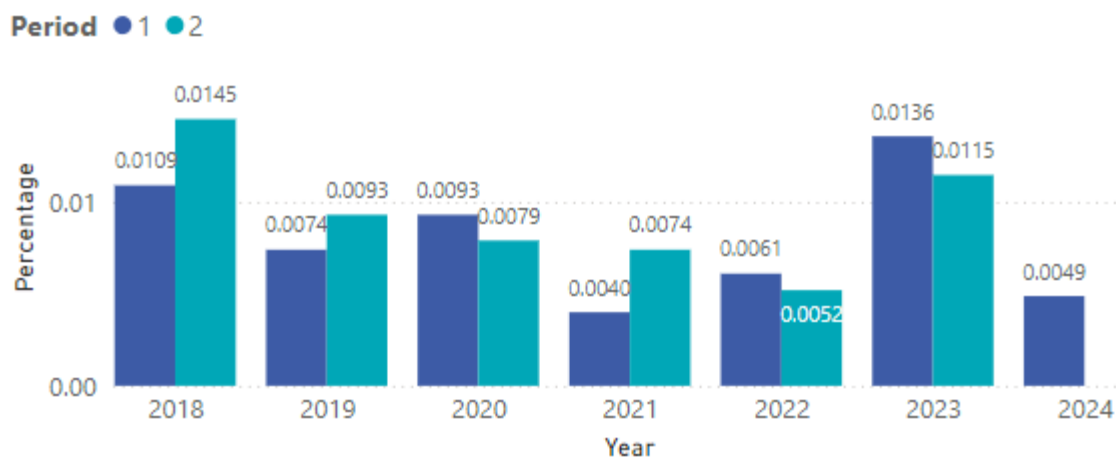


“Average Applicants per Job Posting (E1)” provides critical information about the acquisition of OPL candidates based on job postings. The number of postings represents those posted internally and externally, and does not include competitions which were cancelled or paused. The number of applicants represents all people who applied.

During Period 1 2024, the measure returned a positive result of 89.74 when considering the historical trend and an overall visual of the historical chart. Compared to the same period in 2023, however, results declined from 143.01 or 53.27 fewer applicants per posting. In Period 1 2024, there were 82 job opportunities, resulting in more than 7,359 internal and external applicants. Although Period 1 2024 results are lower than the previous four periods, overall, the current result was sufficient to maintain a positive, upward trend since 2021, indicating a growing interest in library jobs and employment with OPL.

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

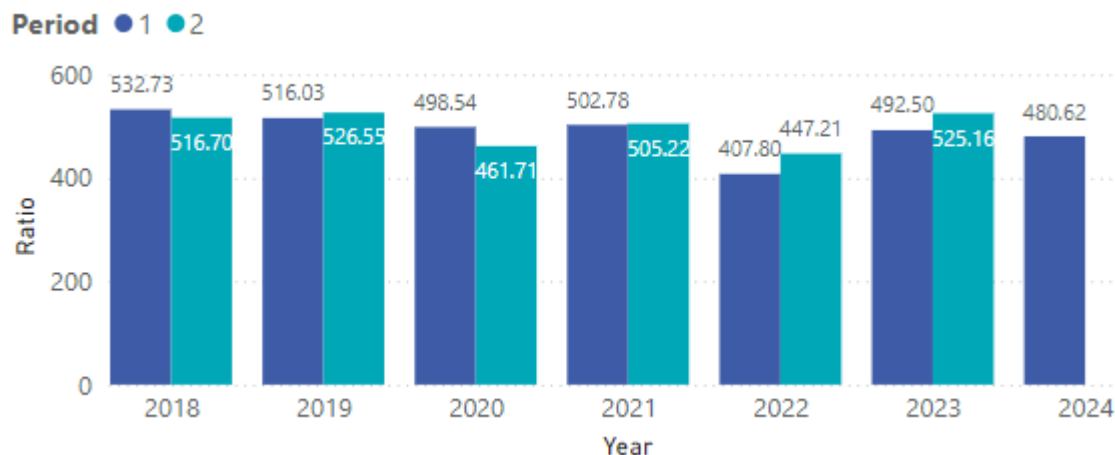
E2 - Employee Turnover Rate



During Period 1 2024, the measure “Employee Turnover Rate (E2)” decreased from 0.0115 to 0.0049. 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.

There were three (3) individuals who left the organization in Period 1 2024, a decrease from eight (8) in Period 1 2023. Of those who left, two (2) out of three (3) were in entry-level positions, where there tends to be higher turnover due to the nature of the jobs. It should be noted that staff efforts to fill vacant positions resulted in an increased headcount, or increase in the total number of employees, by 25.6 (4.16 percent) in 2024 to 614.8, compared to 589.2 in 2023.

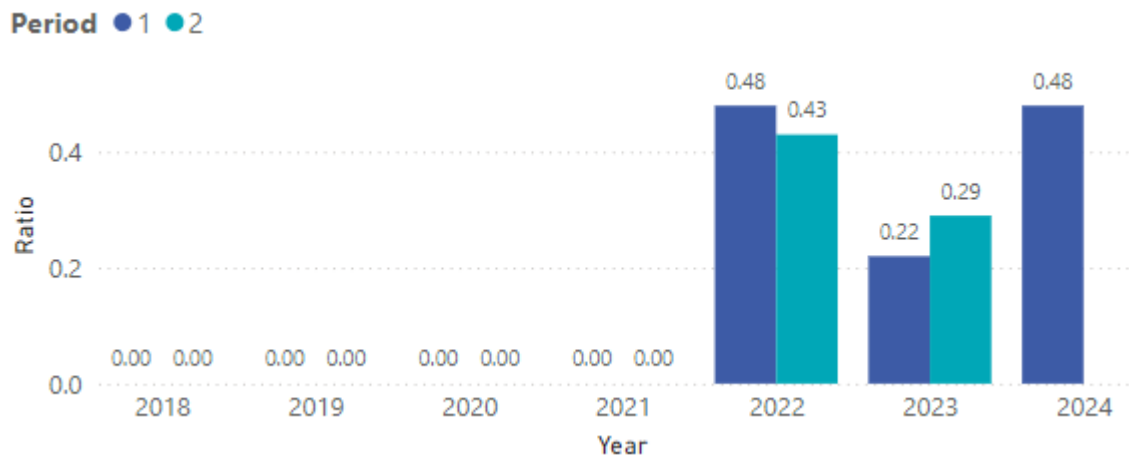
E3 - Active Cardholder to Full-Time Equivalent Ratio



During Period 1 2024, “Active Cardholder to Full-Time Equivalent (FTE) Ratio (E3)” the number of active cardholders per full time employee (FTE) decreased, reaching 480.62 from 492.50 in the previous year. The decrease in the measure “Active Cardholder to Full-Time Equivalent Ratio (E3)” can be directly attributed to the increase in both the active cardholders mentioned in section C2 and an increase in the number of FTEs from 463.73 to 485.20 or 4.42 percent.

This is evidence of continued work in preparing for the Central branch at Ādisōke increasing resources and efforts to fill vacant positions in a timely manner, with the overall number of vacancies returning to normal (pre-pandemic) rates. This has a positive impact on the organization in several areas (e.g. financials are more aligned with budgets, as demonstrated in the Q2 reports).

E4 - New Employee Referral Ratio



The “New Employee Referral Ratio,” measures how many new hires were referred by existing employees.

In Period 1 2024, this ratio increased to 48 percent, up from 22 percent in the same period 2023. There was a total of 10 new employees who responded “yes” in the current period compared to eight (8) in the same period in 2023. The increase of two positive, “yes”, responses represent a 25% increase.

The library received 21 total responses to the survey question in 2024, down from 36 in 2023, a decrease of 15 respondents. The response rate for this measure raises concern in the efficacy of the result and the measure itself. Staff will undertake to increase respondent engagement by communicating the importance of responding to this question upon hire.

CONSULTATION

The development of this report required internal consultation opportunities with all levels of staff to determine causal actions and potential treatments 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, Performance Monitoring.

BUSINESS ANALYSIS IMPLICATIONS

A business analysis implication has been identified in measure E4, relating to the response rate of employees to this survey. This process will be refined in future reporting period to ensure a higher response rate and quality of data.

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 – Performance Measurement Reference Information

Document 2 – KPI Alignment Diagram

Document 3 – Client and Employee KPI Definitions and Rationale

DISPOSITION

The next Semi-Annual Performance Measurement Report will be brought to the Board in April 2025 and will present results from July 1, 2024, to December 31, 2024. The report will include results for measure C3 - Economic Benefit per cardholder.

Performance Measurement Reference Information

The list below identifies the specific measures in alignment with OPL's 2023-2028 Strategic Directions and highlights important client and employee trends. Document 2 further describes the structure in which measures for customer and employee journeys are intended to represent strategic initiatives and how they fit into a balanced scorecard approach. Document 2 provides the official definition of each indicator as approved by the Board so that interpretation and purpose remain consistent throughout the term of the Board.

- 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 (Key Performance Indicators). 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 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 adjusts the experiences of clients and employees and builds capacity.

Indicators C2 and E2 are intended to measure retention rates once visitors and job 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. “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.

OPL Key Performance Indicators								
Group	Customer				Employee			
Strategic Direction	Redesign the Library Experience		Promote OPL's Value		Build Organizational Capacity			
Balanced Scorecard	Operational Effectiveness	Customer Satisfaction		Financial Stewardship	Operational Effectiveness	Employee Satisfaction		Financial Stewardship
KPI	Cardholder Growth Rate	Total 12 Month Active Cardholders	New Cardholder Referral Ratio	Economic Benefit Per Cardholder	Average Applicants per Job Posting	Employee Turnover Rate	New Employee Referral Ratio	Active Cardholder to Full Time Equivalent Ratio

OPL Customer KPI Definitions (2020-2023)			
Strategic Alignment	KPI	Measurement Definition	Rationale
Redesign Library Experience	<i>Cardholder Growth Rate</i>	The percent change of the average number of cardholders created during the reporting period compared to the same period the previous year.	An increased growth rate is indicative of progress towards achieving the strategic statement goal and a library experience that is accessible and appealing to a larger percentage of the population served.
Redesign Library Experience	<i>Total 12 Month Active Cardholders</i>	The total number of cardholders that were active at least one time in the past 12 months.	Strategic Statement objective measurement; increases are indicative of customer retention and representative of general unique use of multiple library services.
Promote OPL's Value	<i>New Cardholder Referral Ratio</i>	The proportion of new cardholders who were referred by current OPL customers.	High referrals drive growth and can be a proxy for customer satisfaction.
Promote OPL's Value	<i>Economic Benefit Per Cardholder</i>	The estimated average economic benefit of service transactions including (Circulation, Program Attendance, and Database usage) per 12-Month Active Cardholder.	Illustrating the average value of service transactions per active cardholder demonstrates the positive economic value that library usage can provide.

OPL Employee KPI Definitions (2020-2023)			
Strategic Alignment	KPI	Measurement Definition	Rationale
Build Organizational Capacity	<i>Average Applicants per Job Posting</i>	The ratio of total applicants to total positions posted during the reporting period.	A high ratio of applicants to postings indicates an increased attractiveness of working for Ottawa Public Library.
Build Organizational Capacity	<i>Employee Turnover Rate</i>	The percentage of permanent employees that resigned for reasons not related to retirement, illness etc..	Low regrettable turnover is indicative of a productive work environment, strong leadership and overall stability.
Build Organizational Capacity	<i>New Employee Referral Ratio</i>	The percentage of new hires referred by OPL employees.	High referrals drive growth and can be indicative of employee engagement.
Build Organizational Capacity	<i>Active Cardholder to Full Time Equivalent Ratio</i>	The number of active cardholders compared to the number of Full Time Equivalent positions in the organization.	An increasing ratio indicates a higher number of active cardholders compared to one full-time equivalent and improved organizational capacity.