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Report to / Rapport au:

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

April 8, 2025 / 8 avril 2025

Submitted by / Soumis par:

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File Number/Numéro du dossier: OPLB-2025-0408-11.3

SUBJECT: Semi-Annual Performance Measurement – July to December 2024

**OBJET: Cadre de mesure du rendement semestrielle – juillet à décembre
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 sector 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 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) KPIs semi-annually. Documents 1 through 3 further describe the intended interpretation of the PMF KPIs. This report provides the Board with a performance measurement update for Period 2: July – December 2024.

DISCUSSION

During Period 2 2024 (July - December), OPL experienced a positive increase in five of the eight KPIs when compared to Period 2 2023. These results indicate a year-over-year (including pre-pandemic periods) improvement in OPL's performance demonstrating library services that are increasingly responsive to community needs.

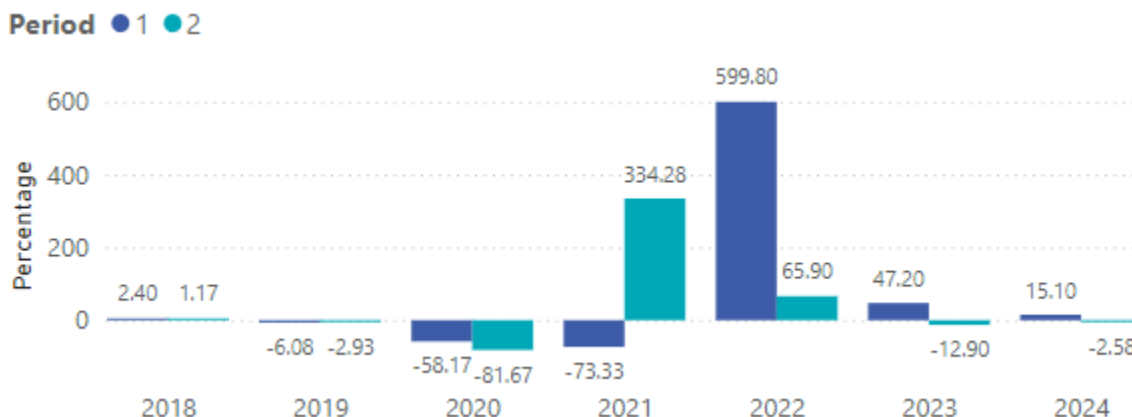
Below are summary tables for all eight KPIs in Period 1 (January to June), and Period 2 (July to December), 2024. Table 2 displays Period 1 results (January to June) year-over-year from 2020 to 2024. Table 3 displays the current measurement period (July to December 2024) as well as Period 2 results from 2019 to 2023. Tables 2 and 3 are followed by a detailed discussion and analysis for each measure for Period 2 2024.

Table 2. Period 1 (January - June) 2020 – 2024						
Code	KPI 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
C3	Economic Benefit Per Cardholder	N/A	N/A	N/A	N/A	N/A
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 3. Period 2 (July - December) 2020 – 2024						
Code	KPI Measure Name	2020	2021	2022	2023	2024
C1	Cardholder Growth Rate (percent)	-81.67	334.28	93.7	-12.90	-2.58
C2	Total Twelve-Month Active Cardholders	214,241	233,378	211,020	244,544	265,327
C3	Economic Benefit Per Cardholder	\$286.54	\$473.46	\$609.49	\$554.40	\$534.06
C4	New Cardholder Referral Rate	18.96	17.47	17.91	17.42	13.21
E1	Average Applicants Per Job Posting	78.00	84.63	135.71	105.75	135.24
E2	Employee Turnover Rate	0.0079	0.0074	0.0089	0.0115	0.0095
E3	Active Cardholder to Full Time Equivalent Ratio	461.71	505.22	447.21	525.16	548.63
E4	New Employee Referral Ratio	N/A	N/A	.43	.29	0.50

Client KPI Summary:

C1- Cardholder Growth Rate

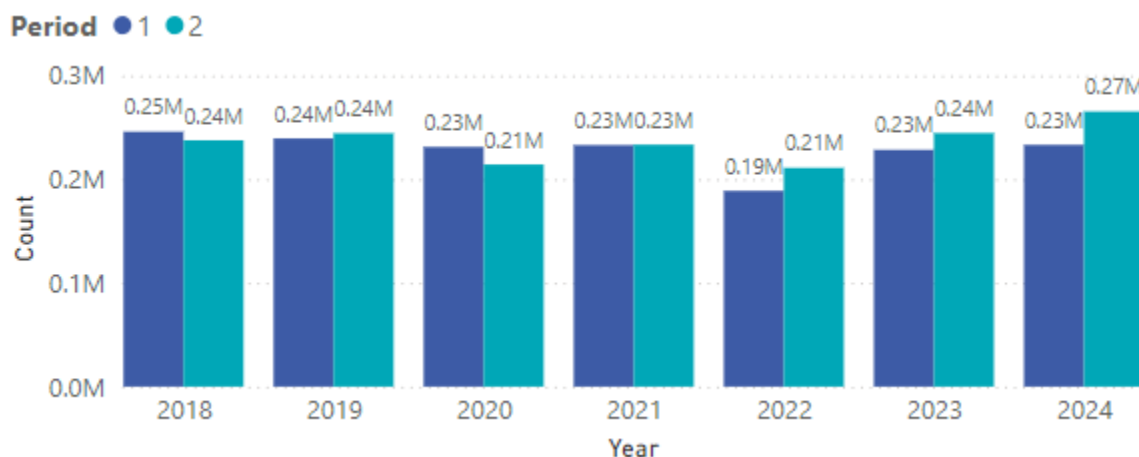


“Cardholder Growth Rate (C1)” measures the activation rate of new library cards as a percentage change in comparison to the same period in the previous year. New library card creation occurs every day, week, and month of the year. This measure captures the rate at which new cards are created. From a magnitude perspective, OPL creates between 15,000 and 30,000 new cards every six-month period. During Period 2 2024, the measure decreased by -2.58 percent. This represents the creation of 634 fewer new library cards than the same period in 2023. Overall, this small reduction in new cardholders does not represent an exception to normal business fluctuation.

As in previous years, the creation of new cards in Period 2 was likely influenced by the TD Summer Reading Club programs and back to school seasonal activities in late August / early September. Subsequent class visits through the rest of the period often have an impact on new card creation.

In addition, throughout October, OPL celebrated Canadian Library Month as part of the annual nationwide campaign. Library Month highlights the valuable role libraries play in communities and provides an opportunity to show appreciation to clients in a memorable way. This year, clients were invited to discover and celebrate the “Joy of Reading/Joie de lire,” a theme central to OPL’s vision, mission, and values.

C2 - Total Twelve-Month Active Cardholders



“Total 12-Month Active Cardholders (C2)” includes the total number of cardholders that were active at least one time in the past 12 months. Card renewals, online resource access, borrowing items, and other activities will prompt an update in the account’s last activity date.

By the end of the Period, 265,327 cardholders were active in the previous twelve months. This represents an increase of 20,783 (8.5 percent) compared to the same period in 2023. The result is the largest number of Active Cardholders reported by OPL in any Period since the initial implementation of the PMF. Total 12-Month Active Cardholders account for 24.25 percent of the total estimated 2024 population of the city of Ottawa. Comparatively, the last time active cardholders represented a similar percentage of the total population was in Period 2 2019 (24.28 percent).

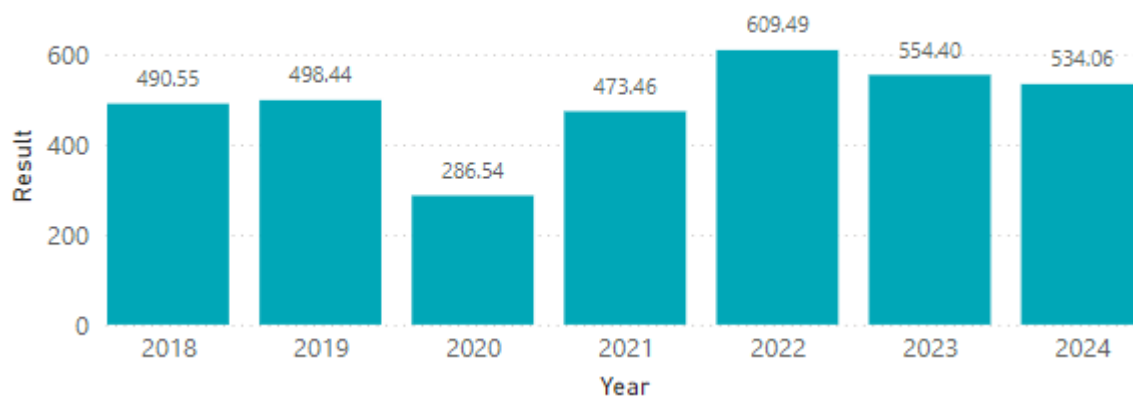
The performance of this KPI may be attributed to continued increased usage of virtual services. Overdrive, the library’s most popular platform for virtual service consumption, continues to be the leading contributor to this trend. Digital circulation of library materials in Period 2 2024 saw a significant increase of 9.48 percent (116,852) over Period 2 2023.

Additionally, the increase in active cardholders could be attributed to an increase in the number of programs, and thereby program attendance, delivered in the Period. The number of programs delivered increased from 4,703 to 5,849, or 24.37 percent. Program attendance increased accordingly from 98,601 to 106,794, a difference of 8,193 or 8.31 percent.

It is important to note that starting late in Period 2, 2024, a new data collection method was introduced to capture programming data. As a result, OPL's data collection methods now prioritize "active programming" that draws on employee expertise, instead of "passive programs" that don't require significant preparation or intervention by employees. While this change in methodology better aligns with service offerings and will improve consistency in data collection practices, it will also result in a one-time reduction to the overall programming numbers in the next measurement period.

C3 - Economic Benefit per Cardholder

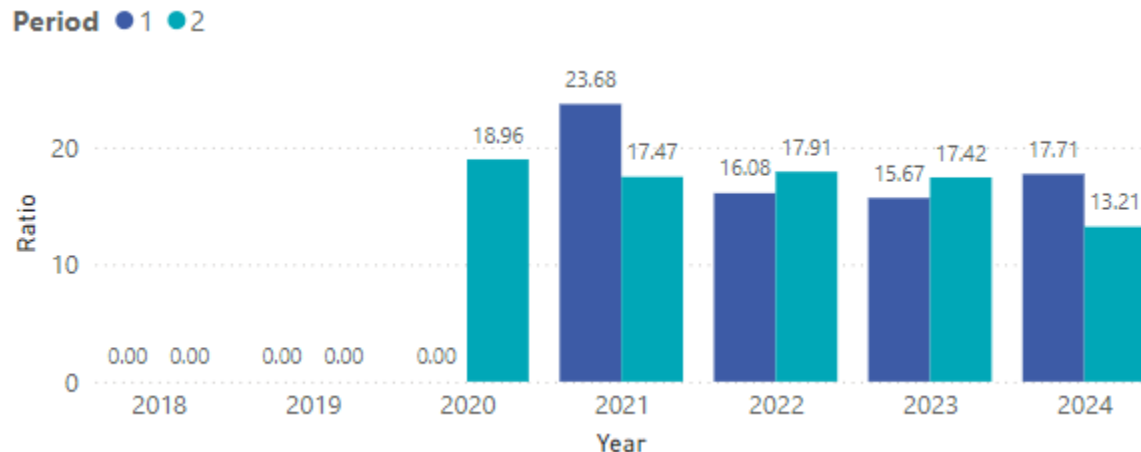
Period ● 2



“Economic Benefit per Cardholder (C3)” is the estimated average economic benefit of transactions including circulation, program attendance, Wi-Fi, and database usage per 12-Month Active Cardholder. It is measured annually and shared through the Period 2 PMF report each April. This indicator represents the benefits received by clients who use free OPL resources, including those who borrow library materials, attend programs, connect to Wi-Fi, or use online databases or other resources. Inflation was applied to the comparative values of the services used in the calculation at a rate of 1.9 percent (as per Statistics Canada).

The economic benefit per active cardholder for 2024 was \$534.06, a decrease from 2023 when the benefit was \$554.40. Overall, the -3.3 percent decrease indicates that the total derived direct benefit from the use of Library services in 2024 was narrowly outgained by the increased number of active users (measure C2) during the year. Despite the very small reduction in benefit, having a library card within the context of current economic conditions and uncertainty remains a valuable and helpful resource proposition and the use of Library services may reduce financial pressures experienced by Library clients.

C4 - New Cardholder Referral Ratio



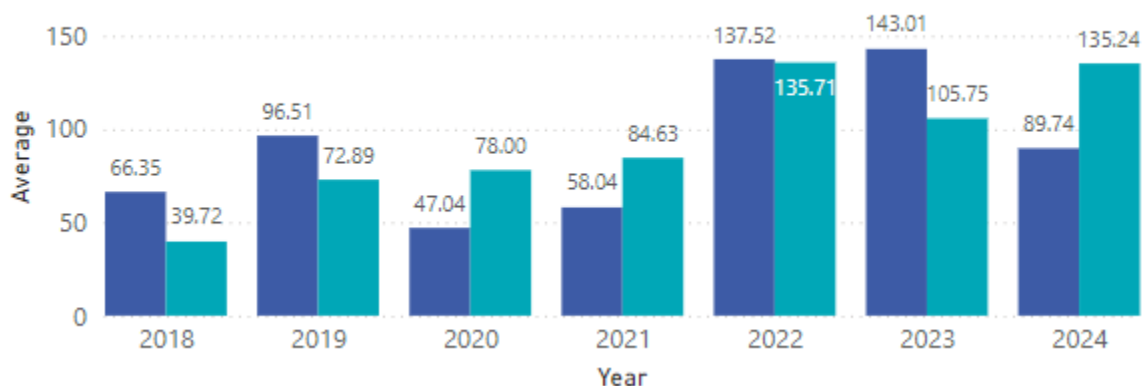
“New Cardholder Referral Ratio (C4)” is defined as the proportion of new cardholders who were referred to OPL by current clients. High referrals drive growth and can be a proxy for client satisfaction. Client referral information is provided voluntarily during online or in-person registration for a new library card. New clients are asked if they were referred to OPL or not, by responding “yes” or “no.” The field for their response may be left blank or contain “N/A” depending on the registration method.

During the reporting period, the measure decreased to 13.21 percent from 17.42 percent in the same period in 2023. The decreased result may indicate, in conjunction with the new cardholder growth rate (measure C1), that new library creation occurred more organically over Period 2 2024. A lower referral rate can indicate that new cardholders signed up for a card on their own rather than being referred to by an existing client. The combined C1 and C4 results also suggest that a greater proportion of 12-month active cardholders were the result of client retention throughout the year instead of the addition of new clients.

Employee KPI Summary

E1 - Average Applicants per Job Posting

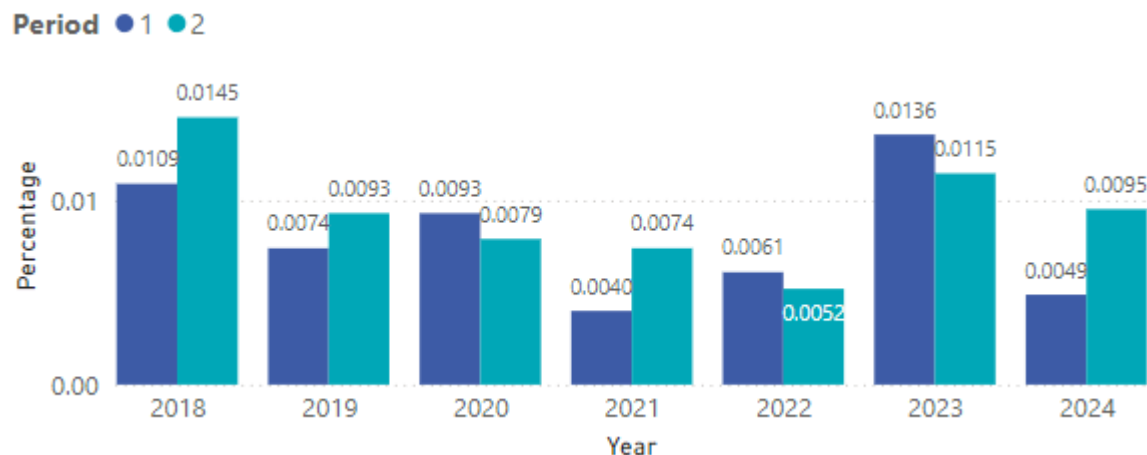
Period ● 1 ● 2



“Average Applicants per Job Posting (E1)” is the ratio of total applicants to total positions posted during the reporting period. The measure provides important indications about the acquisition of OPL candidates based on job posting responses. The number of postings denotes all jobs posted for competition, internally and externally, in which the two-week job posting period completed within Period 2. The number of applicants represents all people who applied.

During Period 2, 2024, the measure increased to 135.24 applicants compared to 105.75 for the same period in 2023. As per the above chart, this represents the most significant increase since 2022. During the reporting period, there were 90 job postings, resulting in more than 12,000 internal (282) and external (11,890) applicants. The current result was sufficient to return to a positive, upward trend since 2021. Opportunities at OPL remain a desirable outcome for both internal candidates, as well as external candidates seeking employment. With increased recruitment on the horizon given new FTEs associated with the Central branch, this bodes well for OPL’s need to hire into the organization. According to more detailed data, applicants were drawn in almost even numbers to public-facing and non-public-facing positions.

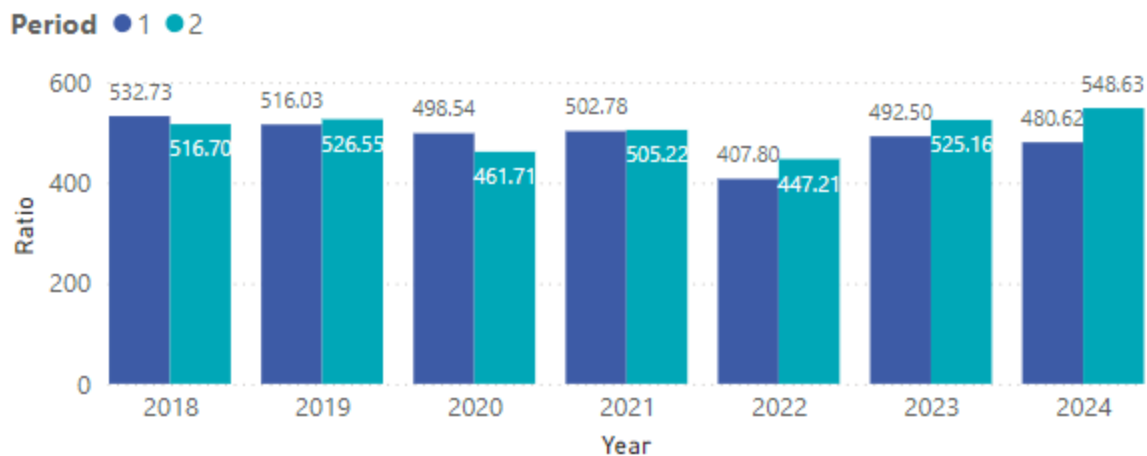
E2 - Employee Turnover Rate



“Employee Turnover Rate (E2)” is 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. 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.

During Period 2 2024, the measure decreased from 0.0115 in 2023 to 0.0095 and has re-aligned to pre-pandemic levels. There were six (6) individuals who met the criteria who left the organization in Period 2 2024, a decrease from seven (7) in Period 2 2023. Of those employees who left, four (4) out of six (6) were in entry-level positions. This is in alignment with historical trends of higher turnover due to the nature of entry-level positions.

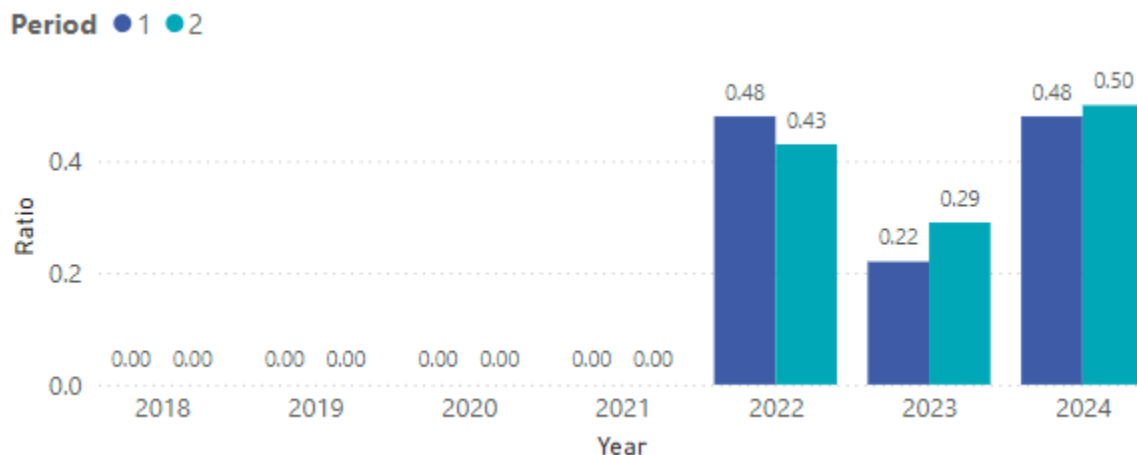
E3 - Active Cardholder to Full-Time Equivalent Ratio



“Active Cardholder to Full Time Equivalent Ratio (E3)” is the number of active cardholders compared to the number of Full Time Equivalent (FTE) positions in the organization. The measure helps OPL understand whether staffing levels are responsive to changes in the active cardholder (client) base. Higher values for this measure can indicate a level of efficiency with a caution that excessive values may be indicative of challenges related to the quality of service or satisfaction.

During Period 2 2024, the number of active cardholders per FTE increased, reaching 548.63 from 525.16 in the same Period in 2023. The increase of more than 23 active cardholders per FTE or 4.3 percent pushed the measure to its highest point in the current and previous terms of the Board. The predominant driver for the result is an increase of more than 20,000 active cardholders since 2023, increasing the measure dramatically despite the operational preparedness measures approved for the Central branch at Ādisōke over the last two fiscal years which added 23 FTEs. Looking ahead, it is anticipated that the measure will decrease significantly with further additions to the total FTE count in support of the opening of the Central branch.

E4 - New Employee Referral Ratio



The “New Employee Referral Ratio,” measures the number of newly hired employees who were referred by existing employees. For the purpose of the PMF, it is surmised that higher results in this measure are indicative of an increased level of employee engagement.

In Period 2 2024, this ratio increased to 50 percent, up from 29 percent in the same period 2023. There was a total of 12 new employees who responded “yes” in the current period compared to eight (8) in the same period in 2023, and an increase of four (4) positive, “yes”, responses. In total, OPL received 24 responses to the survey question in Period 2 2024, up from 21 in the same Period in 2023.

CONSULTATION

The development of this report required internal consultation opportunities with all levels of staff to determine causal actions and potential responses 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 010 CEO Reporting and Board Monitoring, as well as the Strategic Priority to “Increase data-driven decision-making.”

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 – 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 October 2025 and will present results from January 1, 2025, to June 30, 2025. The report will not include results for measure C3 - Economic Benefit per cardholder as that KPI is reported out only once per year each April.

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 journey's are intended to represent strategic initiatives and how they fit into a balanced scorecard approach. Document 2 provides the official definition of each indicator approved by the Board so that interpretation and purpose remain consistent throughout its term.

- 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.

Document 2

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

Document 3

OPL Customer KPI Definitions (2020-2023)			
Strategic Alignment	KPI	Measurement Definition	Rationale
Redesign Library Experience	Cardholder Growth Rate	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	Total 12 Month Active Cardholders	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	New Cardholder Referral Ratio	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	Economic Benefit Per Cardholder	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	Average Applicants per Job Posting	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	Employee Turnover Rate	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	New Employee Referral Ratio	The percentage of new hires referred by OPL employees.	High referrals drive growth and can be indicative of employee engagement.
Build Organizational Capacity	Active Cardholder to Full Time Equivalent Ratio	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.