

Report to / Rapport au:

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

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Submitted by / Soumis par:

**Monique E. Désormeaux, Deputy Chief Executive Officer / Directrice générale
adjointe**

Contact Person / Personne ressource:

*Richard Stark, Manager Facilities Development (613) 580-2424 x 32175,
Richard.Stark@bibliooottawalibrary.ca*

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**SUBJECT: Library Facilities Framework and Investment and Growth Planning
Study**

**OBJET: Étude de planification des investissements et de la croissance des
installations de la Bibliothèque**

REPORT RECOMMENDATIONS

That the Ottawa Public Library Board:

- 1. Approve Table 1, Facilities Framework, which summarizes the approach for new, expanded, or renewed facilities as further described in this report;**
- 2. Approve Table 2, Proposed Branch Renewal Priorities (2016-2021) as further described in this report;**
- 3. Receive the Library Facilities Investment and Growth Planning Study (Danix, 2016); and,**

- 4. Direct staff to use the recommendations within the Facilities Investment and Growth Planning Study to prepare the Development Charges Project Listings in 2018.**

RECOMMANDATIONS DU RAPPORT

Que le Conseil d'administration de la Bibliothèque publique d'Ottawa :

- 1. Approuve le tableau 1, Cadre des installations qui résume l'approche adoptée relativement aux installations nouvelles, agrandies ou restaurées, comme décrit plus en détail dans le présent rapport;**
- 2. Approuve le tableau 2, Priorités proposées en matière de renouvellement des succursales (2016-2021), comme décrit plus en détail dans le présent rapport;**
- 3. Prenne connaissance de l'étude de planification des investissements et de la croissance des installations de la Bibliothèque (Danix, 2016),**
- 4. Charge le personnel d'utiliser les recommandations de l'étude de planification des investissements et de la croissance des installations pour préparer les listes de projets liés aux redevances d'aménagement en 2018.**

BACKGROUND

The Ottawa Public Library (OPL) network of facilities consists of 33 branches and a materials distribution centre. As stewards of the public good, it is staff's responsibility to work with the OPL Board in planning for, and securing capital funds to, maintain existing facilities, renew/retrofit existing facilities, and build new facilities.

The Facilities Framework provides a consistent means by which staff can make effective decisions with respect to library facilities using objective rationale for moving forward. It considers drivers affecting the work to be done, source information upon which decisions are to be made, and funding sources available for facilities projects. Documenting this process facilitates both decision-making, and communication with the community at large. The Facilities Framework is intended to:

- Provide staff with an approach to ensure that existing library facilities are properly maintained, renewed and/or retrofitted in order to deliver modern day library services that meet customer needs; and,
- Describe and define when and where new library facilities are built.

This framework has been developed in tandem with the completion of the Library Facilities Investment and Growth Planning Study, a requirement in planning for the renewal of the Development Charges Bylaw, scheduled for 2018.

In 2014, the City of Ottawa approved its Development Charge Bylaw, including the growth-related requirements for the Ottawa Public Library. The Bylaw provides a funding formula for future new library facilities, and/or expansions of current facilities, based on a quantity and quality standard calculated on ten-year averages. This is done in compliance with provincial development charge legislation. The Development Charge Bylaw is re-approved by Council on a five-year cycle. As part of this cycle, OPL is required to undertake a growth planning study to outline where and how future Development Charge funds will be invested in OPL facilities and services after the approval of each new Bylaw. The study serves to inform the renewed Development Charges Project Listing schedule.

The focus of the previous 2011 Library Facilities Investment and Growth Planning Study (LFIGPS) was on growth requirements and future new library needs in the City of Ottawa. It was the first time, however, that a growth planning study included discussion around the need for an asset renewal plan. Subsequently, it was recognized that there was a need to identify OPL's branch renovation and renewal priorities.

In 2011, staff worked with the 2011-2014 OPL Board Facilities Planning Committee, to conduct an analysis of all branches to determine branch renewal priorities. This resulted in the Facilities Planning Committee Report, which was approved by the OPL Board on May 14, 2012. It identified eight branch priorities, and directed staff to undertake the planning and renewal of these branches through the long range capital forecast.

DISCUSSION

The financial and planning framework under which OPL facilities are built, improved, renovated, and maintained, fall into the two broad categories:

- Existing, falling into one of three categories (i.e. lifecycle, retrofit, and renewal), and
- New (primarily, though not always, growth related).

Table 1 – Facilities Framework presents an overview of these categories, followed by details for each category, and OPL's current and forthcoming projects per category. The Ottawa Central Library Development project has been excluded from analysis in this context as it is progressing through a different stream of work, given the June 2015 Board-approved motion to build a new Central Library based on the findings of a business case analysis.

Table 1 – Facilities Framework

Facility Category	Drivers	Source Documentation / Information	Funding Approach
Existing Building (Lifecycle)	<ul style="list-style-type: none"> • Ongoing replacement requirements to maintain facilities (e.g. carpeting, roofing, HVAC) 	<ul style="list-style-type: none"> • Building condition assessment inventories (City) • Annual list approved by Board and Council as part of budget exercise 	<ul style="list-style-type: none"> • City capital budget funds
Existing Building (Retrofit)	<ul style="list-style-type: none"> • Sections of buildings needing to be retrofitted for specific programs (e.g. RFID, Makerspace) 	<ul style="list-style-type: none"> • Identified need • Business case as required 	<ul style="list-style-type: none"> • OPL capital budget funds • Other (e.g. external infrastructure funding programs)

Existing Building (Renewal)	<ul style="list-style-type: none"> • Aging buildings • Inability to deliver modern day library services • Inadequately sized or poorly designed libraries 	<ul style="list-style-type: none"> • System-wide facility assessment • Board approved priority list • Project management principles 	<ul style="list-style-type: none"> • OPL capital budget funds • Other (grants, external infrastructure funding programs)
New Build	<ul style="list-style-type: none"> • Population growth • Underserved service areas • Availability of DC funds and operating budgets 	<ul style="list-style-type: none"> • DC Bylaw Board approved list of projects • Library Facilities Investment and Growth Planning Study • Business case as required 	<ul style="list-style-type: none"> • Development Charge funds (90%) • OPL Capital budget funds (10%) • Other (e.g. grants, external infrastructure funding programs)

A. Lifecycle Projects

The City of Ottawa's Asset Management Unit provides for lifecycle renewal and replacement works to existing building assets. Detailed scope of work for specific projects extends to a wide assortment of work, such as roof replacement, building preservation, building mechanical and electrical systems, property elements, hard landscaping, facility equipment, and unplanned emergency work.

The annual programming allocations are set by the City for all service areas including OPL. The annual budgets for lifecycle projects are included as part of OPL's capital budget submission and categorized under Lifecycle Renewal of City Assets.

The City's Asset Management, Business & Technical Services Branch identifies lifecycle priorities as part of the budget planning cycle. OPL facilities, like other City facilities, receive building condition audits on ten-year intervals, which are then used to prioritize replacements proposed in the budget planning cycle. OPL provides feedback on the proposed list before it is finalized based on recent lifecycle needs

identified at its branches. Lifecycle budgets are managed by the Asset Management Unit.

The 2016 lifecycle budget for the renewal of library buildings is \$935,000 and is detailed in the City's budget book. The overall budget amount varies year-over-year as it is affected by budgetary directions and decisions made by the City.

The maintenance and lifecycle renewal of all City assets including buildings is a long term concern for the City of Ottawa. The Asset Management Unit has initiated a project to develop a funding approach across the infrastructure capital programs under their management, which will be grounded in asset management leading practices. At the same time work is underway to develop an integrated planning framework. Once this work has been completed there will be an improved lifecycle management framework in place for the ongoing renewal and replacement work in OPL building assets.

B. Retrofit Projects (e.g. Radio Frequency Identification (RFID), Makerspace)

OPL retrofits smaller sections of its 33 branches on an ongoing basis in order to improve the customer experience. This can be due to new technology installations or upgrades to existing systems. The focus is on improved efficiencies or improved customer experiences. Retrofits are funded through a combination of sources including the Strategic Initiatives portion of OPL's annual capital budget program and government grants.

This has been evident in the RFID branch retrofits program which has been underway since 2012 and will be completed in 2017. The branch retrofits centralized multiple service points to a single point often with a new service desk, upgraded book drops, replaced security gates, added automated sorters in larger branches, centralized sorting processes in smaller branches, added new self-checkout units and modified functions to any adjacent areas affected by these changes.

Most recently, the Imagine Space at the Nepean CentrepoinTE branch was expanded to 800 sq.ft. in adjacent space. Thanks to a provincial grant, OPL was able to address public demand for additional laser cutting equipment. Retrofitting was required to address both the ventilation requirements of the new equipment, and the popularity of the service with the community at large.

C. Renewal Projects

As time passes, library facilities age and become tired, worn, and dated in light of the evolving needs of their communities. Buildings that were designed for library services twenty, thirty or more years ago no longer function efficiently with today's library equipment and services. Modern equipment and services are often placed into existing buildings without sufficient funding available to modify the facility to maximize efficiencies and fully integrate them into the building's design and layout.

Building renewal can take many forms, but at its simplest, is a renovation which refreshes all interior components and furnishings of the building and addresses inadequate and outdated functional layouts. When a branch is renewed it takes into account the current layout and usage needs, and improves upon them so that they better meet the needs of the public using that facility, and address safety, accessibility, and other modern building requirements.

Renovations cannot address all improvement needs if the existing branch is smaller than the requirements for the services and programs it delivers. In such instances, a business case must be developed to evaluate opportunities and determine whether it is in the library's and the taxpayers' best interest to expand an existing facility, to relocate in either a newly built or leased facility, or to explore other solutions as warranted. In addition, funding for furniture and equipment replacement is an important component of each renewal project as are operating costs if these exceed the regular funding envelope.

While OPL explores potential grant and infrastructure funding opportunities, renewals are primarily funded through the Strategic Initiatives portion of OPL's annual capital budget program.

On May 14, 2012, the OPL Board approved the Facilities Planning Committee Report which identified the top eight branch renewal priorities. Staff was directed to incorporate these renewal priorities into future planning including the development of the nine-year capital forecast. It was recognized that the list would be addressed as opportunities arose, and not necessarily in terms of priority, in order to provide flexibility in planning for these improvements.

Using project management rigour, significant progress has been made on this list since this direction was made in 2012. The following is an overview of these branches in their order of priority and their status to date.

1) **Main** 2012 Renewal Requirement: Renovation

Main was recognized as the overall priority given its age and state of repair and importance to the OPL branch system. Initial examinations focused on significant renovations and lifecycle improvements which lead to a Board report on July 7, 2014, which provided information and options for modernizing the existing facility. Subsequent to receiving a business case to review modernization options against a new build, the Board approved a motion to build a new facility. As such, it is recommended that Main Library be removed from the 2016-2021 renewal list. **STATUS: To be removed from renewal priorities**

2) **Rosemount** 2012 Renewal Requirement: Renovation

Rosemount (6,089 sq. ft.) is a Carnegie library first built in 1918, was expanded in 1932, and last renovated in 1982. In 2014, a \$100,000 capital allocation was budgeted for undertaking retrofit planning for Rosemount. Since 2012, a number of alternate location opportunities arose, were evaluated, and were subsequently ruled out. As per Board direction, an application for a Canada 150 grant was submitted in 2015 to help defray the costs of renewal, but was not approved. Work to date has included a Building Condition Audit, an Expansion Feasibility Study, a Building Code & Accessibility Review, and a Preliminary Design Study with cost estimates. The Board direction in 2012 was to renovate Rosemount. The recently completed research points to undertaking a significant renewal of this branch. The renewal option will be presented as part of the 2017 budget exercise. **STATUS: Ongoing Planning**

3) **Constance Bay** 2012 Renewal Requirement: Relocation

The Constance and Buckham's Bay Community Association partnered with the City of Ottawa's Parks, Recreation and Cultural Services, and OPL to expand their community centre in 2013. This provided OPL the opportunity to leave its former 519 sq. ft. basement branch for a bright new 1,100 sq ft. ground floor location in the addition. The relocated branch opened to the public on September 3, 2015. **STATUS: Completed**

4) **Centennial** 2012 Renewal Requirement: Renovation

Centennial (9,744 sq. ft.) has received minor improvements since 2012. It is scheduled to have its vestibule renovated to be fully accessible in September-October 2016. In 2013, its roof was replaced for a cost of \$80,000 through the City's lifecycle renewal program. Preliminary discussions have focused on an extensive renovation and possible minor expansion in 2018-2019. No cost estimates are available at this time. **STATUS: To be scheduled**

5) **Emerald Plaza** 2012 Renewal Requirement: Relocation

In 2012, Emerald Plaza had 5,644 sq. ft. and had seen little improvement since it first moved into this location in 1988. It was OPL's busiest branch per sq. ft., and was compact, crowded and busy. In 2012, an unexpected opportunity arose to acquire an adjacent mall unit later that year. OPL was able to secure the necessary funding to lease this space in 2013. The budget also included funds to properly fit up the additional space. The expanded and completely renovated branch opened in July 2013. The branch was able to almost double its size to 10,528 sq. ft. **STATUS: Completed**

6) **Elmvale Acres** 2012 Renewal Requirement: Renovation

Elmvale Acres (7,493 sq. ft.) was refreshed in 2013 with new carpeting and paint and addressed new furniture and shelving requirements. In 2015, it underwent a RFID retrofit which added a new accessible entrance to the branch along with a new service hub. **STATUS: Completed**

7) **North Gower** 2012 Renewal Requirement: Renovation with 20% expansion

North Gower (2,364 sq. ft.) is a small branch in an older building dating back to 1872. In July 2016, it underwent a makeover with new shelving, furniture, paint, and carpeting. Funded in part with help from the Friends of the Ottawa Public Library Association, this project had a total budget of \$78,000. Staff have explored alternative locations, but no firm plan has yet been confirmed to expand this branch. A business case will be developed to evaluate options as these become available to either expand, relocate or to build new. Should an option be viable, it will be brought forward to the Board, most likely as part of the annual budget exercise. **STATUS: Phase I Completed**

8) **Orléans** 2012 Renewal Requirement: Renovation

Orléans (17,183 sq. ft.) underwent an RFID retrofit in 2015 in which it received new carpeting in the entranceway and around the new single point of service. Further work is still required to complete recarpeting, repainting, renew furniture and shelving, as well as possibly modify service delivery at this branch.

Tentatively these may be scheduled for 2018-2020. **STATUS: Phase I Completed**

Renewal Summary

Significant progress has been made on these Board-approved branch renewal priorities since the May 14, 2012 OPL Board report. Of the eight branch renewal priorities, three have been completed, two have completed phase I, two are in planning stages, and one has yet to be scheduled. Staff were directed to incorporate these renewal priorities into the nine-year capital forecast for 2013-2021. This has been done based on the immediacy and complexity of each project, and projected available funding. These renewals have been proceeding on that basis and are on target to meet the 2021 completion goal. As such, Rosemount, Centennial, North Gower, and Orléans remain on the renewal projects' list to be completed.

OPL works with the City's Planning, Infrastructure and Economic Development Department, and follows project management rigour in planning and undertaking significant renovations to its facilities. In cases where renovations or minor expansions to an existing facility will not meet the required space needs of the branch, other opportunities will be investigated. If a move to another location is contemplated, a business case will need to be undertaken to confirm the proposed requirement.

The status of the renewal priority list will be reported back to the OPL Board when the next LFIGPS is brought forward. Staff recommend that no additional branches be added to the facilities renewal priority list at this time. Upon completion of the current projects, the Board will participate in the development of a new list of long term facility renewal priorities. This is an essential process for ensuring that OPL continues on an ongoing path of branch renewal.

Table 2 – Proposed Branch Renewal Priorities 2016-2021

Branch	Type	Ownership	Year Built	Last Date Modified	Size (sq.ft.)	Renewal Requirement
Rosemount	Standalone	Owned	1918	1982	6,089	Renovation
Centennial	Standalone	Owned	1967	1989	9,744	Renovation
North Gower	Archives Building	Leased	1972	2016	2,364	20% expansion
Orléans	Standalone	Owned	1995	—	17,183	Renovation

D. New Library Buildings and the Library Facilities Investment and Growth Planning Study 2016

The 2016 Library Facilities Investment and Growth Planning Study (LFIGPS) updates and extends the previous 2011 study to incorporate growth analysis for all areas of the city, including urban and rural, and the need for appropriately-sized facilities to serve these communities over the next 20 years. The report also contains a section which examines current building asset renewal costs, budgeting and associated financial pressures given current fiscal capabilities. The LFIGPS excludes analysis and a recommendation relating to a new Central Library as this work is being completed via a different planning stream.

The primary growth component of the LFIGPS details the results of a library service needs assessment. This data emanates from detailed analysis of the City's growth projections and is consistent with both the City Official Plan and the recent Development Charges Background Study. The new projections identify high levels of growth in the south suburban district of Barrhaven/Riverside South with significant levels of growth in the west (Kanata/Stittsville) and in the eastern (Orléans) suburbs. Smaller amounts of growth were identified in the central urban areas inside the Greenbelt (resulting from intensification). Finally, small amounts of growth were also seen in the rural districts.

Facility requirements were determined as a result of a gap analysis, which compared the current amount of library facility space in twelve geographic zones with projected future requirements based on the growth data analysis. The requirements were determined on the assumption of providing the same level of per capita service space in each of the twelve zones. The overall facilities gap is projected to reach 59,457 square feet by 2023, and will continue rising to 92,502 square feet by 2031.

In light of the LFIGPS findings, staff recommends addressing this gap through a program of new branches in Riverside South, Orléans, and Barrhaven from 2018 to 2022. Building this new infrastructure is contingent on population and receipt of necessary capital and operating funds.

A facility in the Riverside South community is OPL's current new branch priority, with the project being referred to as South Urban Branch. While growth capital funding exists, funds have yet to be secured for OPL's share of the necessary capital dollars and to operate a new facility. Further details will be brought forward for OPL Board review and approval through the annual budget process.

The recommendations contained in the 2016 Library Facilities Investment and Growth Planning Study will be used by OPL to confirm and assist in facilities planning and project prioritization. Development Charge revenue will be directed toward the growth needs identified in this report. These will be identified in annual updates to the long range financial plans of OPL's capital budget forecasts. Beaverbrook was the only growth building project completed in the period since 2011 after the previous LFIGPS was submitted.

All new construction utilizing development charge resources are funded through the Growth portion of OPL's annual capital budget program. Development Charge funds utilized for new construction projects can constitute up to 90% of the full project's budget. The balance is funded through OPL's capital budget funding envelope and approved by both the Board and Council via the budget process.

CONSULTATION

The Board Facilities Renewal and Growth Planning Study Ad Hoc Committee consisting of Trustees Marianne Wilkinson and Pamela Sweet, as well as OPL staff, provided advice and guidance to staff on the LFIGPS upon review of draft and final draft versions of the report. The report was also reviewed by the City's Asset Management, Business & Technical Services Branch.

LEGAL IMPLICATIONS

There are no legal implications associated with this report.

RISK MANAGEMENT IMPLICATIONS

There are no risk management implications associated with this report.

FINANCIAL IMPLICATIONS

There are no financial implications associated with this report.

ACCESSIBILITY IMPACTS

All lifecycle renewal and new construction must comply with the City of Ottawa's Accessibility Design Standards (November 2015) which is used to apply the Accessibility for Ontarians with Disabilities Act (AODA, 2005).

TECHNOLOGY IMPLICATIONS

There are no technology implications associated with this report.

BOARD PRIORITIES

The Library Facilities Investment and Growth Planning Study aligns with the OPL Board's 2015-2018 strategic priority of "SPACES for community, collections, and creation". Branch improvements are part of the Board's direction to "Sustain collaborative and flexible physical spaces across the library system."

SUPPORTING DOCUMENTATION

Document 1 Danix Management Limited, Ottawa Public Library Facilities Investment and Growth Planning Study, July 2016 *(Immediately follows the report)*

DISPOSITION

Upon approval of the proposed branch renewal priorities as outlined in Table 2, and receipt of the Library Facilities Investment and Growth Planning Study (Danix, 2016) recommendations, staff will incorporate priorities into the long range capital plan and the Development Charges Projects listings.