Ottawa Public
Library / Bibliothèque
publique d'Ottawa

Report to / Rapport au:

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

October 8, 2019 / 8 octobre 2019

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File Number: OPLB-2019-1003

SUBJECT: Semi-Annual Performance Measurement – January to June 2019

OBJET: Cadre de mesure du rendement semestrielle – Janvier à juin 2019

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

The Ottawa Public Library (OPL) Board approved the Performance Measurement Framework (PMF) at its meeting in May 2013 (Board Report # OPLB-2013-0052). On April 12, 2016, the Board approved an updated list of Key Performance Indicators (KPI) (Motion # OPLB-2016-0143). The list was approved to align performance measures with OPL's 2014-2018 Strategic Directions:

- Services that are customer centric;

- Spaces for community, collections, and creation; and,

- Success through learning, literacy, and innovation.

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The PMF uses data collected through a variety of sources, including OPL's integrated library system, the City's financial management system, and manual data collection. The PMF employs a range of measurements to evaluate the performance of the organization. During Period 1 2019, the results for 10 KPIs are reported across three categories (for definitions, see Appendix A):

1. Customer Satisfaction (CS):

    (CS 1.1) Total Circulation;

    (CS 1.2) Total Electronic Visits;

    (CS 1.3) Total Cardholders Active in Last 12 Months;

    (CS 1.4) Customer Satisfaction Score;

    (CS 1.5) Percent of Available Meeting Room Hours Booked; and,

    (CS 1.6) Reach and Awareness Ratio.

2. Operational Effectiveness (OE):

    (OE 1.1) Hold Time to Availability (Days);

    (OE 1.2) Total Program Attendance per Square Foot; and,

    (OE 1.3) Percent of Physical Materials Checked Out.

3. Financial Stewardship (FS):

    (FS 1.1) Operating Cost per Library Use

DISCUSSION

Results Summary

OPL reports on nine performance indicators on a semi-annual basis. This method of data analysis increases reliability and meaningful comparisons for an organization, as KPIs are consistently compared to a specific measurement period. Table 1 provides a summary of Period 1 (January – June) 2019 KPI results in comparison to Period 1 2018. Measurements that improved or decreased by more than plus or minus five percent are represented by an upward or downward arrow in the table below. A

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negative percent change in Cost Per Library Use and Hold Time to Availability signifies an improvement. See Appendix B for chart displaying trends by period.

Table 1. January – June 2019 KPI Measurement Results Summary

Measure	2018	2019	Difference	Change	Direction
Cost Per Library Use	1.98	1.97	-0.01	-1%	↗
Electronic Visits	6,819,448	6,443,078	-376,370	-6%	↓
Hold Time to Availability	8.00	7.83	-0.17	-2%	↗
Per cent of Available Meeting Room Hours Booked	36.83	44.76	7.93	22%	↑
Per cent of Physical Materials Checked Out	22.96	25.18	2.22	10%	↑
Reach and Awareness Ratio	4.86	5.18	0.32	7%	↑
Total Cardholders Active (Last 12 Months)	245,878	239,390	-6,488	-3%	↘
Total Circulation	5,698,331	6,003,245	304,914	5%	↗
Total Program Attendance per Square Foot	0.2426	0.2515	0.0089	4%	↗

During Period 1 2019, Cost Per Library Use, Hold Time to Availability, Total Cardholders Active, Total Circulation, and Total Program Attendance per Square Foot were stable. In each case, the year-over-year change was less than plus or minus 5 percent when compared to Period 1 2018. Recognizing the impact that a decrease in Active Cardholders will have on the achievement of the Strategic Statement as part of the 2020 - 2023 Strategic Plan approved by the Board, staff are investigating cardholder characteristics and circumstances that may contribute to cardholders becoming inactive.

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OPL experienced a significant increase in the available Meeting Room Hours Booked, the Percent of Physical Materials Checked Out, and the Reach and Awareness Ratio and a decrease in Electronic Visits.

These results indicate stability in OPL's overall performance categories of customer satisfaction (CS), operational efficiency (OE), and financial stewardship (FS). OPL staff take great pride in finding new ways to reach individuals and communities and, most importantly, to inspire connections and growth.

Further analysis of the data has revealed two emerging themes that have contributed to a more responsive library service for customers. They include:

- System-Wide Initiatives and Customer Usage Trends
- Community Connections.

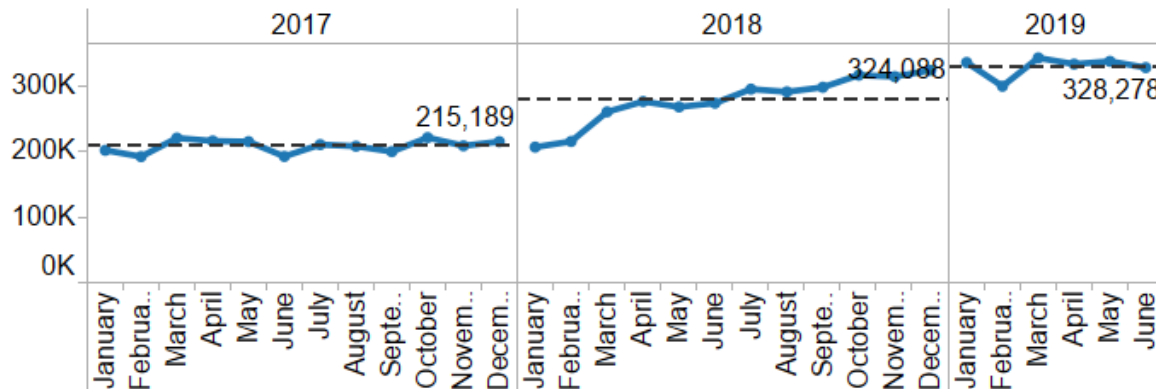**System-Wide Initiatives and Customer Usage Trends**

During Period 1 2019, there was an increase in total circulation (renewals and streaming), hold time to availability, and total physical materials checked out, when compared to Period 1 2018. Together these positive results provide important insights regarding enhanced system-wide initiatives, focused on a) new loan periods, b) electronic visits, c) collection maintenance, and d) optimizing hours of operations.

A) New Loan Periods

On January 24, 2018, OPL introduced new loan periods and fee structure that continues to have a positive effect on total circulation and the percentage of physical materials checked out during January - June 2019. A prominent change associated with the new structure was the addition of unlimited renewals on regular items unless the item has been requested by another customer. Renewals demonstrated growth throughout 2018 which appears to have stabilized in Period 1 2019 (see Figure 1).

Practices such as revised loan periods for renewals and the popularity of a seamless online/mobile experience has enhanced global access to OPL's collections by simplifying the borrowing experience and reducing barriers to the collection. Borrowed items can also be retained longer helping to mitigate overdue fees.

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Figure 1. Total Item Renewals (January 2017 to June 2019)

B) Electronic Visits and Mobile Usage

As mobile usage continues to increase, the ability to access online resources directly through vendor applications or websites can limit session counting capabilities. Limited session counting can decrease the total number of electronic visits despite an increased usage of the online resource.

Overdrive, the library's largest on-line lending platform, provides one example where visits have decreased, but usage, as measured using items downloaded, has increased.

Overdrive provides the Libby mobile app so that customers can access Overdrive content on their smartphones or tablets. OPL is investigating access to sessions generated through Libby and third-party mobile applications. Despite the reduction in the number of electronic visits in Figure 2, Figure 3 demonstrates an increase in loans as a result of more first-time and renewal activity.

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Figure 2. Overdrive Electronic Visits (January 2017 to June 2019)
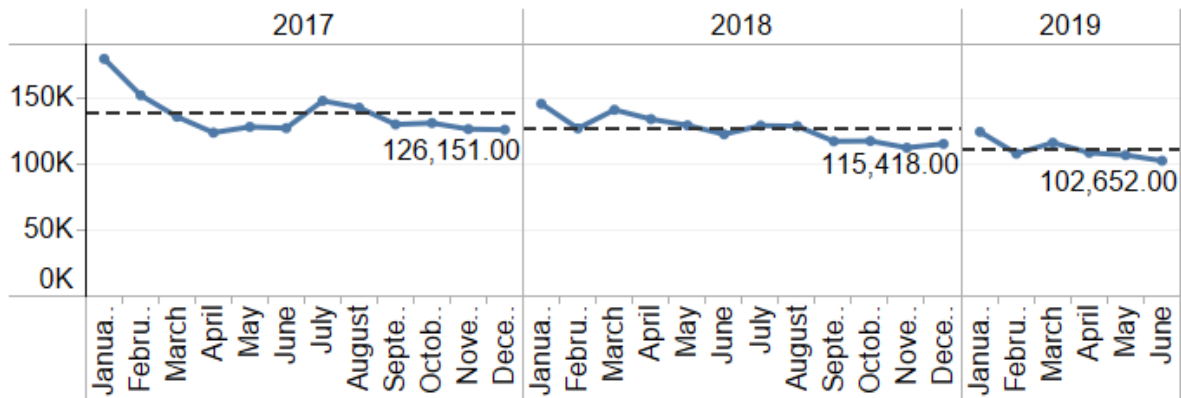
Figure 3. Overdrive Digital Downloads (January 2017 to June 2019)

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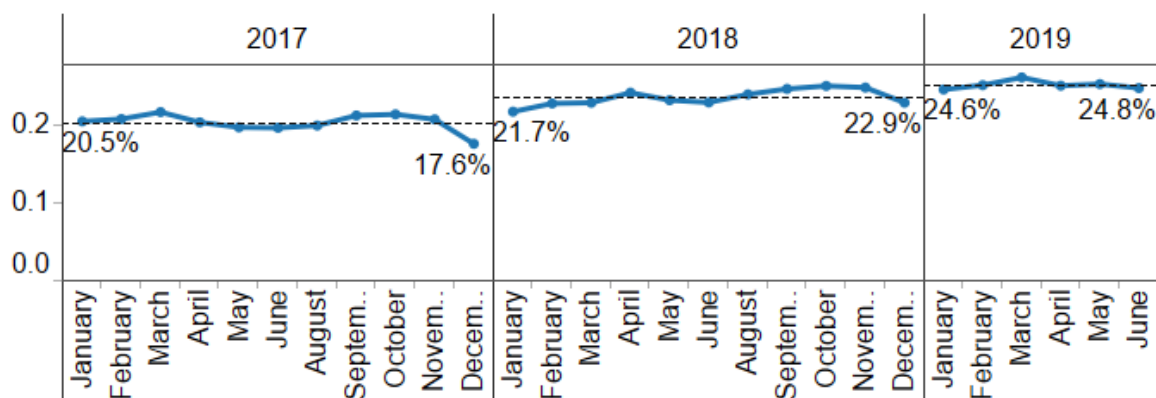**PUBLIQUE D'OTTAWA**
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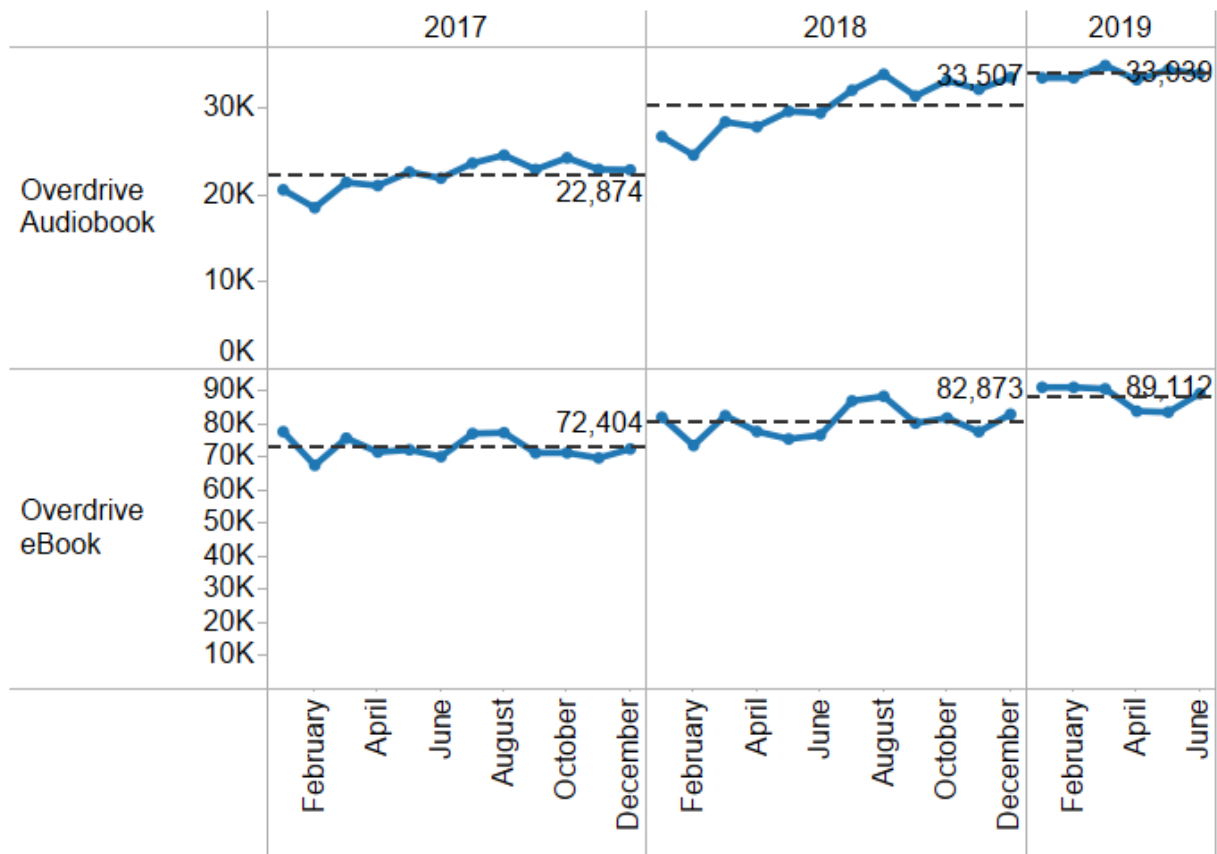
C) Collection Maintenance

One of OPL's core system-wide initiatives focuses on maintaining the collection. Collection maintenance is an essential aspect of a healthy and well-used collection, both at the branch level and within the context of a robust library system.
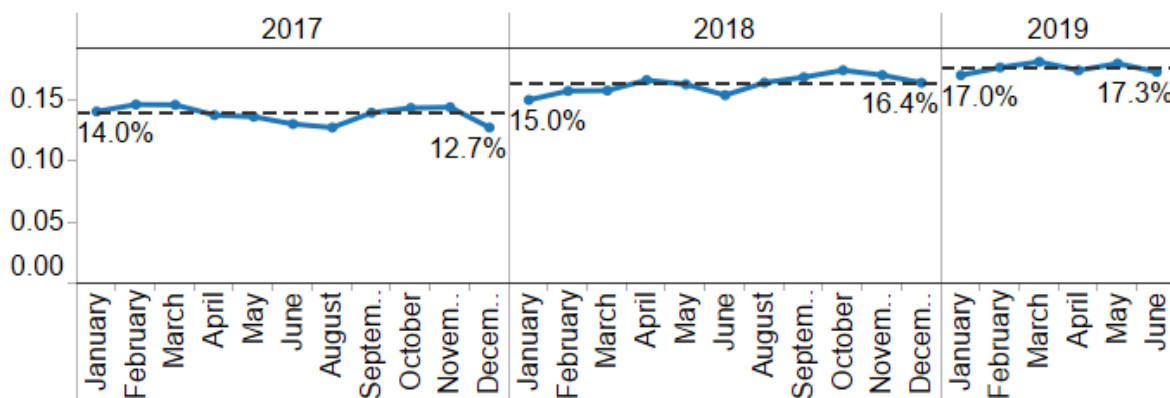
During Period 1 2019, staff efforts to maintain an active collection through effective management and merchandising practices has contributed to significant growth in the percentage of physical materials checked out, and in particular at the Main branch. A higher number of materials checked out demonstrates a collection that is current, useful and reflective of changes in the community. Express and staff displays are paramount to support information literacy and respond to customer trends.

Figures 4 and 5 below illustrate the year-over-year increase in physical items checked out for all branches including the Main branch.

Figure 4. Percentage of Physical Materials Checked Out (All branches - January 2017 to June 2019)

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Figure 5. Percentage of Physical Materials Checked Out (Main Branch - (January 2017 to June 2019)

D) Hours of Operations

During Period 1 2019, a third initiative that contributed to an increase in total circulation and attracted new card holders was the extension of hours of operation until the end of June 2019. The number of new library cards issued grew by 9.65 percent, with 50 percent of the growth occurring during the new Sunday hours of operation. The three additional Sunday hours of operation aligned with the school calendar and generated additional circulation as well as new cardholders. The new Sunday hours of operation responds to the changing patterns of work, study, education, and leisure of OPL communities.

Community Connections

During Period 1 2019, there was significant growth in the percentage of booked meeting rooms and program attendance when compared to Period 1 2018. Together, these positive results provide important insights into building community connections through a variety of contexts that focus on a) public engagement sessions, b) increased programming and events, and c) eContent Advocacy.

A) Public Engagement Series

Community engagement remained high throughout Period 1 2019 surrounding the Ottawa Public Library (OPL) and Library and Archives Canada (LAC) Joint Facility. Activity and promotion on all social media platforms (Facebook, Twitter, Instagram) related to the Inspire555. As the OPL-LAC Joint Facility approaches

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conceptualization, the community demonstrated a growing interest in participating in the design aspects of a library intended to be a landmark destination that will generate enthusiasm for the library system across the city.

This positive growth in reach and awareness is further supported by two external partners (City of Ottawa and Library and Archives Canada) who also referenced and promoted the engagement series on their social media.

B) Programming and Events

Program attendance and total use of meeting rooms, for in-branch programming and events, have significantly increased from Period 1 2018. Through collaborative resource sharing and applying a program and community development approach, OPL is offering more programs throughout the calendar year, contributing to the overall increase in program attendance at OPL.

OPL continues to leverage partnerships with local organizations and institutions; forging a shared literacy mission. Partnerships are essential to meeting community needs and to sustaining engaging programs. Joint programming and events also further enhanced OPL's reach and awareness results, contributing to strong connections with our customers and their communities.

During Period 1 2019, OPL developed strong partnerships with the Ottawa International Writers Festival, Library and Archives Canada, l'Association des auteures et auteurs de l'Ontario français, and the Canada Revenue Agency.

Although the KPI measure applies to programs held in library branches, the popularity of external programs held in the community during the period significantly increased OPL's reach and awareness results, contributing to building and sustaining strong community connections. External program venues during Period 1 2019 included the National Arts Centre, Meridian Theatres at Centrepointe, and Library and Archives Canada.

C) eContent Advocacy

During Period 1 2019 OPL experienced continued growth across its digital download platforms which include the award-winning online express Cloud Library (eBooks and eAudio), RBDigital (Magazines), the New Cantook Station, and Overdrive.

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These results continue to demonstrate that customers value OPL's online resources for accessibility and convenience.

To further promote the accessibility of eBooks and eAudiobook formats and to equitably address the prohibitive costs and purchasing restrictions public libraries face for eContent, OPL participated in an advocacy campaign. The eContent campaign, One eRead Canada, occurred in June and generated exceptional social media attention. Participating libraries offered free, unlimited access to *Glass Beads* by Dawn Dumont to provide their customers a shared reading experience. While direct circulation from these campaigns may not have had a large and immediate impact, these campaigns were well supported by the community, ultimately raising awareness about the services OPL offers.

CONSULTATION

There are no external consultations 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.

FINANCIAL IMPLICATIONS

There are no financial implications associated with this report.

ACCESSIBILITY IMPACTS

There are no accessibility impacts associated with this report.

TECHNOLOGY IMPLICATIONS

There are no technology implications associated with this report.

BOARD PRIORITIES

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

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SUPPORTING DOCUMENTATION

Appendix A – KPI Definitions
Appendix B – KPI Summary Chart

DISPOSITION

At its meeting in June 2019, the Board approved a new Strategic Plan for 2020 – 2023. The Strategic Statement summarizing the goal of the new plan is "By 2023, we will increase the number of active cardholders by 25 percent by improving OPL's community relevance." In response to this new and clear mandate, and, subsequently, in accordance with the Performance Measurement Framework, a new set of Key Performance Indicators is being developed.

A report on the new KPI measurements and their linkage to the new strategic plan and statement will be brought to the Board in Q1 2020. Pending Board approval, the first measurement period of 2020 will be utilized to collect the required data. The next semi-annual performance report in April 2020 will reflect the current KPI's. The October 2020 semi-annual performance report will be reporting on the new OPL Strategic Plan and redefined KPI's.

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Appendix A

KPI Definitions

Definitions

1. Customer Satisfaction (C.S)

Customer Satisfaction provides a performance perspective on the OPL's strategic priority: Services that are customer centric and is central to the mission and vision.

CS 1.1 Total Circulation (Physical and Digital Circulation)

Total Circulation includes first-time circulation, renewals, streaming services, and digital downloads. Digital downloads include Overdrive, Zinio, Freegal, Cloud Library, and MaBiblio. Streaming services include Freegal, Hoopla, Naxos, Kanopy, Access Video on Demand (AVOD), and ArtistWorks, a new service complementing the Music Lending Library (MILL).

CS 1.2 Total Electronic Visits

Total Electronic Visits (sessions) include customer accesses of the Library website, the on-line catalogue, and databases through internal and external networks or wireless means.

CS 1.3 Total Cardholders Active in Last 12 Months

An active cardholder is defined as a customer who during the last 12-month period: borrowed, renewed, or returned library material; was issued and/or paid a fee; reserved library material and/or a computer; updated their Library card; registered for a library program; or, logged onto their account via the OPL virtual branch and/or catalogue.

CS 1.4 Customer Satisfaction Score

The Library bases its Customer Satisfaction Score on respondents' experiences online or in a branch during the measurement period. Customer feedback is captured using a 1-5 scale, where one represents very unsatisfied and five represents very satisfied. The result below reflects the percentage of respondents selecting four and five in comparison to the total number of responses.

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An open and anonymous form provides visitors the ability to provide comments, concerns, and compliments, and to suggest ways that OPL can improve its services. OPL managers have reviewed customer feedback and follow-up is provided when requested. Results reflect a non-randomized observational methodology.

CS 1.5 Percent of Available Meeting Room Hours Booked

CS 1.5 represents the total number of meeting room hours booked divided by the total number of meeting room hours available.

CS 1.6 Reach and Awareness Ratio

CS 1.6 represents the number of electronic news and social media posts referencing OPL divided by the number of OPL-generated posts on biblioottawalibrary.ca and OPL's social media channels (Facebook, Twitter, and Instagram).

Reach and Awareness Ratio is an indicator of the role of OPL in promoting reach and value within a broad media context.

2. Operational Effectiveness (OE)

Operational Effectiveness is a performance category that monitors operational function of the organization.

OE 1.1 Hold Time to Availability

Hold Time to Availability measures the median days from the time a hold is placed electronically, to the time it is available for pick up, for all holds that are checked out (completed) in the measurement period. In this measure, a lower number is more advantageous to the customer.

OE 1.2 Total Program Attendance per Square Foot

OE 1.2 represents the total in-branch program attendance / total programming space (sq. ft.)

OE 1.3 Percent of Physical Materials Checked Out

OE 1.3 is the average number of items currently checked out divided by the total items available at each branch.

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3. Financial Stewardship (FS)

The financial stewardship category is an indicator of operational costs related to the delivery of library services.

FS 1.1 Operating Cost per Library Use

Cost per Library Use is calculated by dividing operating costs by the total number of library uses during the measurement period. In this measure, cost is defined as all costs associated with the day-to-day operation of OPL.

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KPI Summary Chart

Appendix B