Report to / Rapport au:

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

October 11, 2016 / 11 octobre 2016

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File Number: OPLB-2016-0194

SUBJECT: **Semi-Annual Performance Measurement Report – January – June 2016**

OBJET: **Rapport sur le cadre de mesure du rendement semestrielle – Janvier – Juin 2016**

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 prenne connaissance de ce rapport.

BACKGROUND

The Ottawa Public Library (OPL) Performance Measurement Framework (PMF) was approved by the Board at its meeting in May 2013. At the April 12, 2016 Board meeting an updated list of Key Performance Indicators (KPI) was approved to better align performance measures with the Library's Strategic Directions: Services that are customer centric, Spaces for community, collections, and creation, and Success

through learning, literacy, and innovation. The updated KPI list uses a balanced scorecard approach with 10 KPIs divided across three categories:

1) Customer and Employee Satisfaction (CES):

   (CES 1.1) Total Circulation,

   (CES 1.2) Electronic Visits,

   (CES 1.3) Total Cardholders (Active in last 12 months),

   (CES 1.4) Customer Satisfaction Score (New in 2017),

   (CES 1.5) Percent of Available Meeting Room Hours Booked (New in 2017), and;

   (CES 1.6) Communications (New in 2017).

2) Operational Effectiveness (OE):

   (OE 1.1) Hold Time to Availability (New in 2017),

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

   (OE 1.3) Percent of Physical Materials Checked Out.

3) Financial Stewardship (FS) is measured by the following metric:

   (FS 1.1) Operating Cost per Library Use.

The updated list of KPIs has some similarity to the previous list carrying forward three measures: Total Circulation, Electronic Visits, and Cost per Library Use. The updated list of KPIs contains seven new additions including: Total Program Attendance per Square Foot, Percentage of Physical Materials Checked Out, Total Cardholders Active in the Last 12 Months, and four additional KPIs that will be introduced in 2017 as indicated above.

Data is collected through a variety of sources, including: OPLs integrated library system, the City's financial management system, and manual data collection. The PMF uses a variety of measurements in order to take a holistic view of the overall health of the organization and its performance.

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The PMF monitors performance through the measurement of cost inputs and results. It provides quantitative information about the operating environment of the corporation to enhance and inform strategic decision making. Core analysis techniques used to assess KPI results include segmentation, past performance, and observing industry trends.

DISCUSSION

This report reflects results from the first measurement period (January-June, 2016). During this period, the Library saw performance improvements for four KPIs when compared to the same period in 2015.
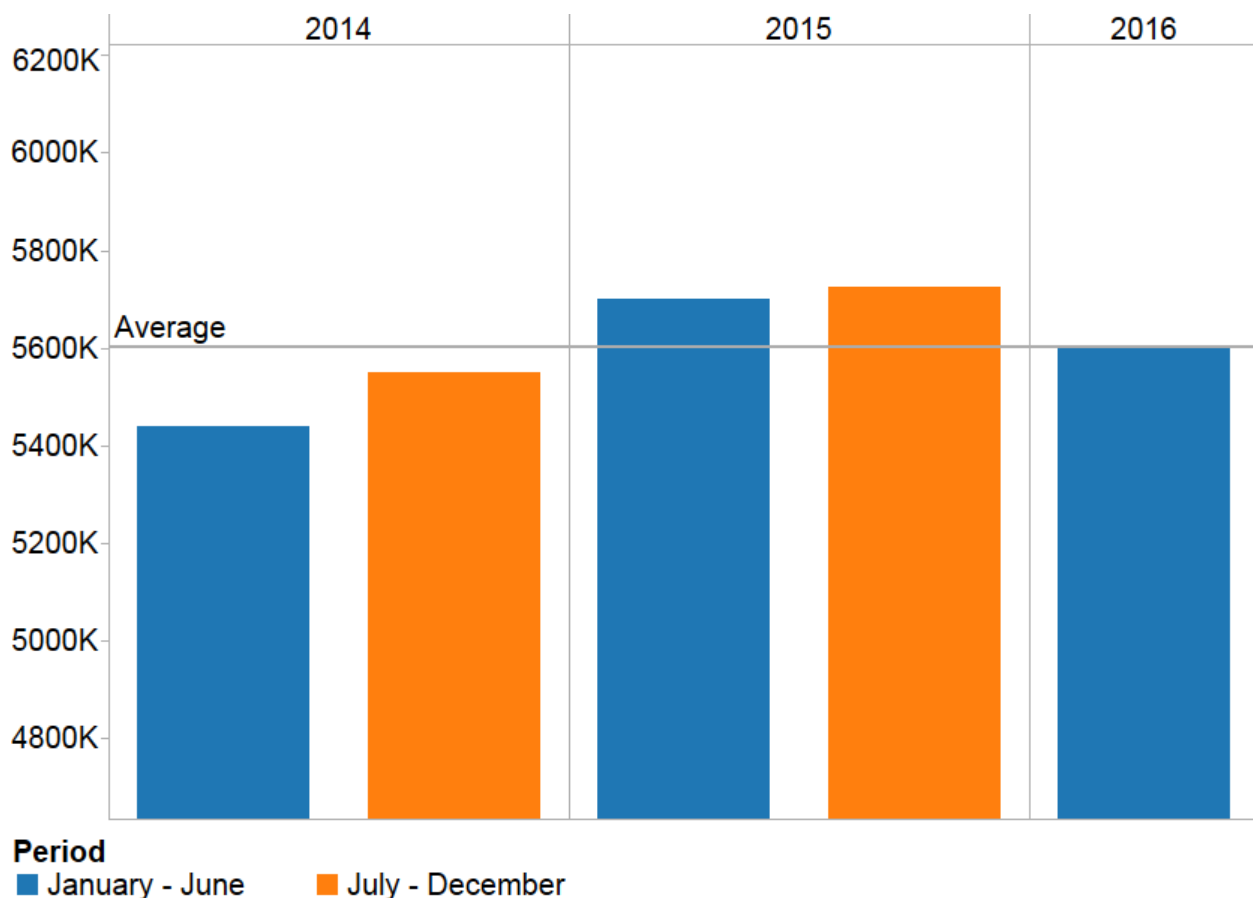
Table 1. January-June KPI Measurement Results

Measure	2015	2016	Difference	Change (%)
(CES 1.1) Total Circulation	5,701,731	5,600,588	-101,143	-1.8%
(CES 1.2) Electronic Visits	7,992,096	7,432,767	-559,329	-7.0%
(CES 1.3) Total Cardholders	220,895	248,300	27,405	12.4%
(OE 1.2) Total Program Attendance per Square Foot	0.1864	0.2006	0.0142	7.6%
(OE 1.3) Percent of Physical Materials Checked Out	18.80	19.40	0.60	3.2%
(FS 1.1) Operating Cost Per Library Use	1.86	1.72	0.14	7.5%

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Significant factors impacting performance in the CES category during the first half of 2016 include:

The rollout of Radio Frequency Identification (RFID) technology at Carp, Centennial, Vanier, and Stittsville branches, increased awareness of the OPL due to publicity surrounding the Central Library Development project (CLDP) and related public engagement sessions, the launch of the new CLDP website, the announcement of a potential partnership opportunity with Library and Archives Canada (LAC) for the Central Library, the implementation of targeted collection maintenance, and changes to the OPL digital catalogue interface, Bibliocommons.

1. Customer and Employee Satisfaction

CES 1.1 Total Circulation (Physical and Digital Circulation)

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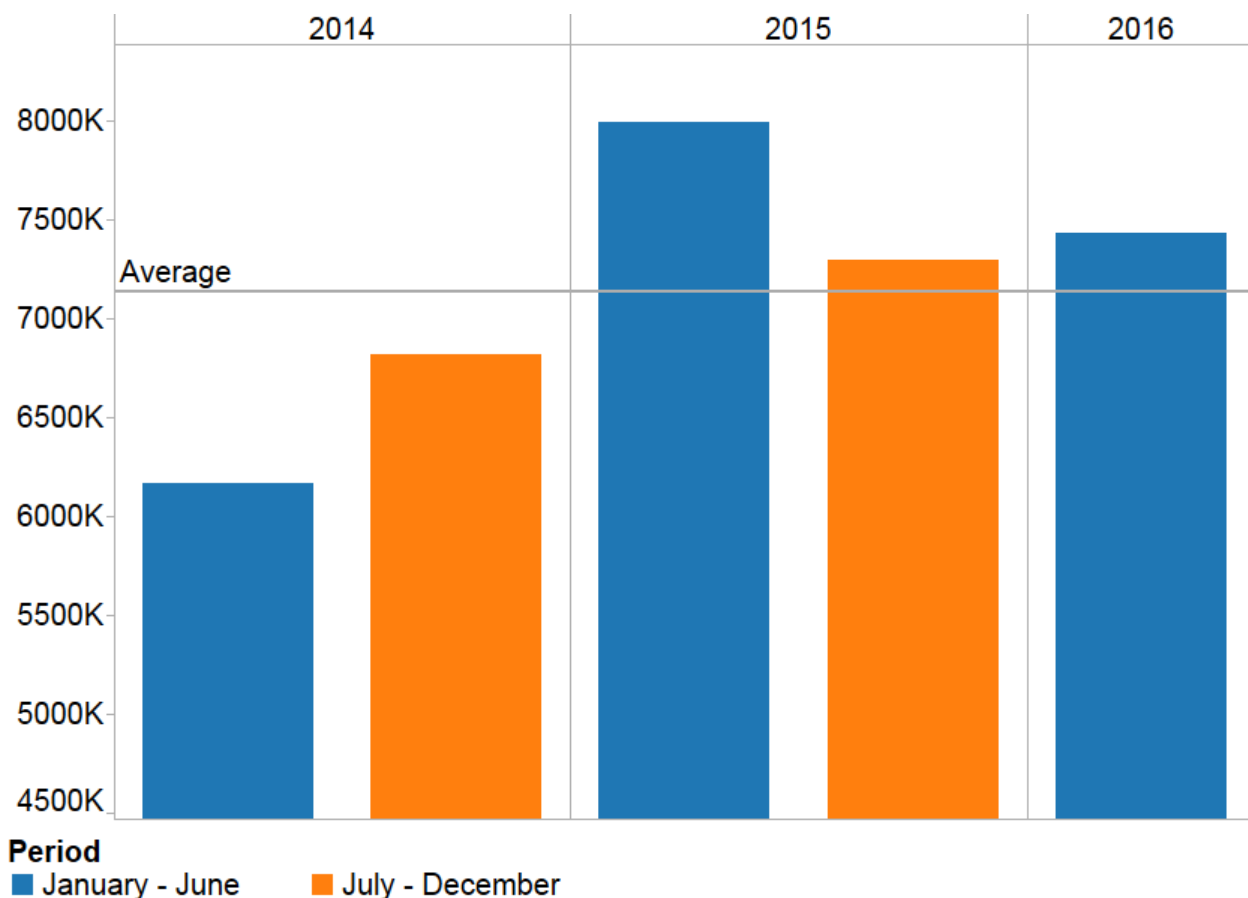**RAPPORT OPLB-2016-0194**
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[Total circulation encompasses first-time circulation, renewals, streaming services and digital downloads. Digital downloads are comprised of Overdrive, Zinio, Freegal, and MaBiblio. Streaming services are comprised of Freegal, Hoopla, Naxos, and Access Video on Demand (AVOD)].

During the first measurement period in 2016 approximately 5.6 million items were borrowed. The result is a slight decrease of -1.8% from the same period in 2015 but meets the period average realized since the beginning of 2014. The largest service segment influencing the change was decreased usage of streaming music services, offsetting an increase in digital downloads.

In the streaming service area, the Library faces competition from free versions of streaming services such as Spotify and Pandora.

CES 1.2 Electronic Visits

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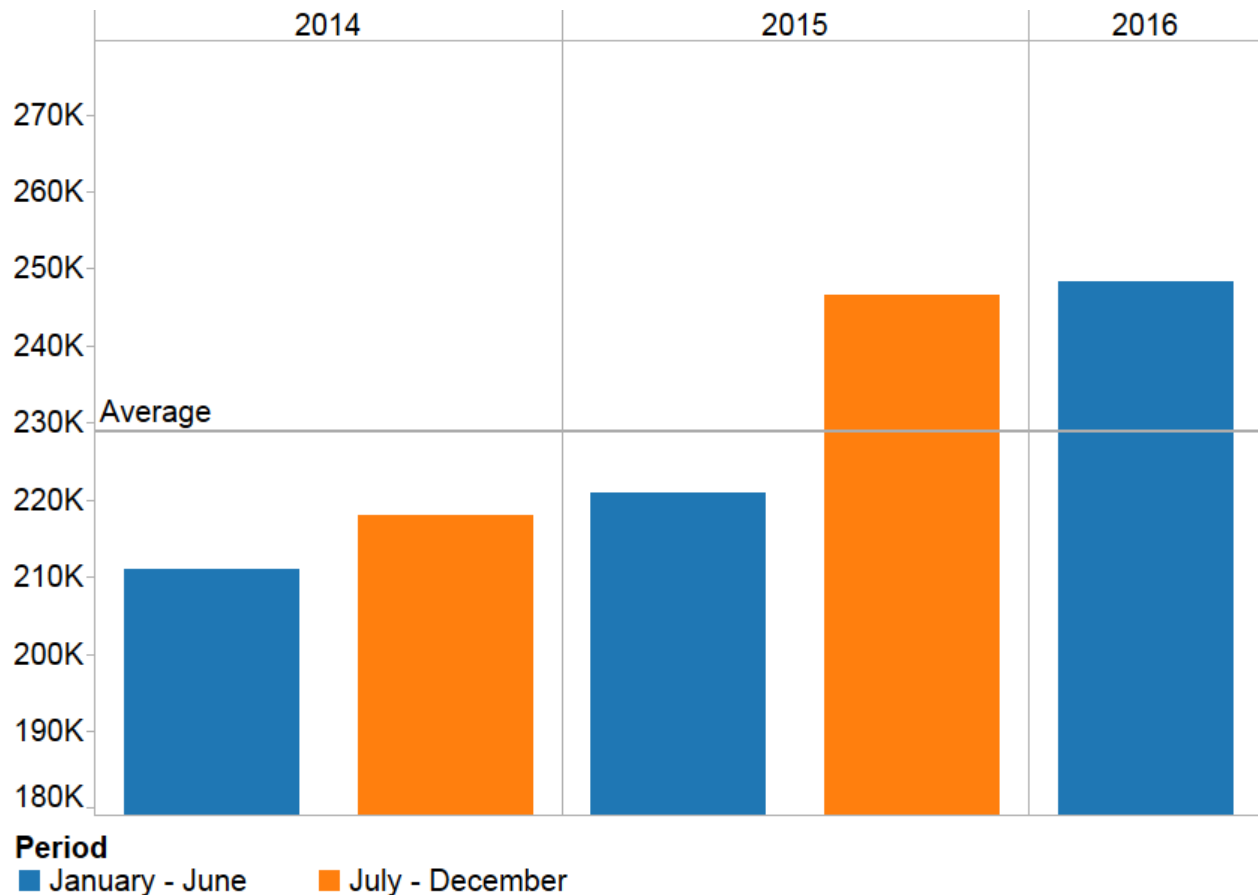**11 OCTOBER 2016**   **11 OCTOBRE 2016**

[Electronic visits (sessions) are counted when customers access the library's website, catalogue, and databases through network or wireless means.]

The largest percentage of electronic visits (e-visits) to the OPL is generated by the Library's website and Bibliocommons, the OPL's online catalogue. In Period 1 of 2016, there were more than 7.4 million e-visits. The results represent a decrease of -7.0% compared to the same time frame in 2015.

In 2014, changes to the OPL public computing infrastructure led to the adoption of a more inclusive and representative tracking methodology for e-visits. Measurement definitions were revised to ensure that the use of all electronic platforms were included in the total e-visits count which, over the course of 2014 and early 2015 caused an increase of nearly two million e-visits.

E-visits from mobile and third-party platforms like Overdrive, Mobile, and the Central Library website continue to have positive impacts on e-visits, however, redesigns in the Bibliocommons platform requiring one less mouse click to access customer accounts are a major driver for the measurement decline. Periodic updates to web-based platforms such as Bibliocommons have had similar effects in previous measurement periods.

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CES 1.3 Total Cardholders Active in last 12 months (New)

[An active card holder is defined as a customer, who during the last 12 month period, updated their card, borrowed, renewed or returned library material; was issued and/or paid a fee or fine; reserved library material or a computer; registered for a library program; or logged onto their account via the OPL virtual branch and/or catalogue.]
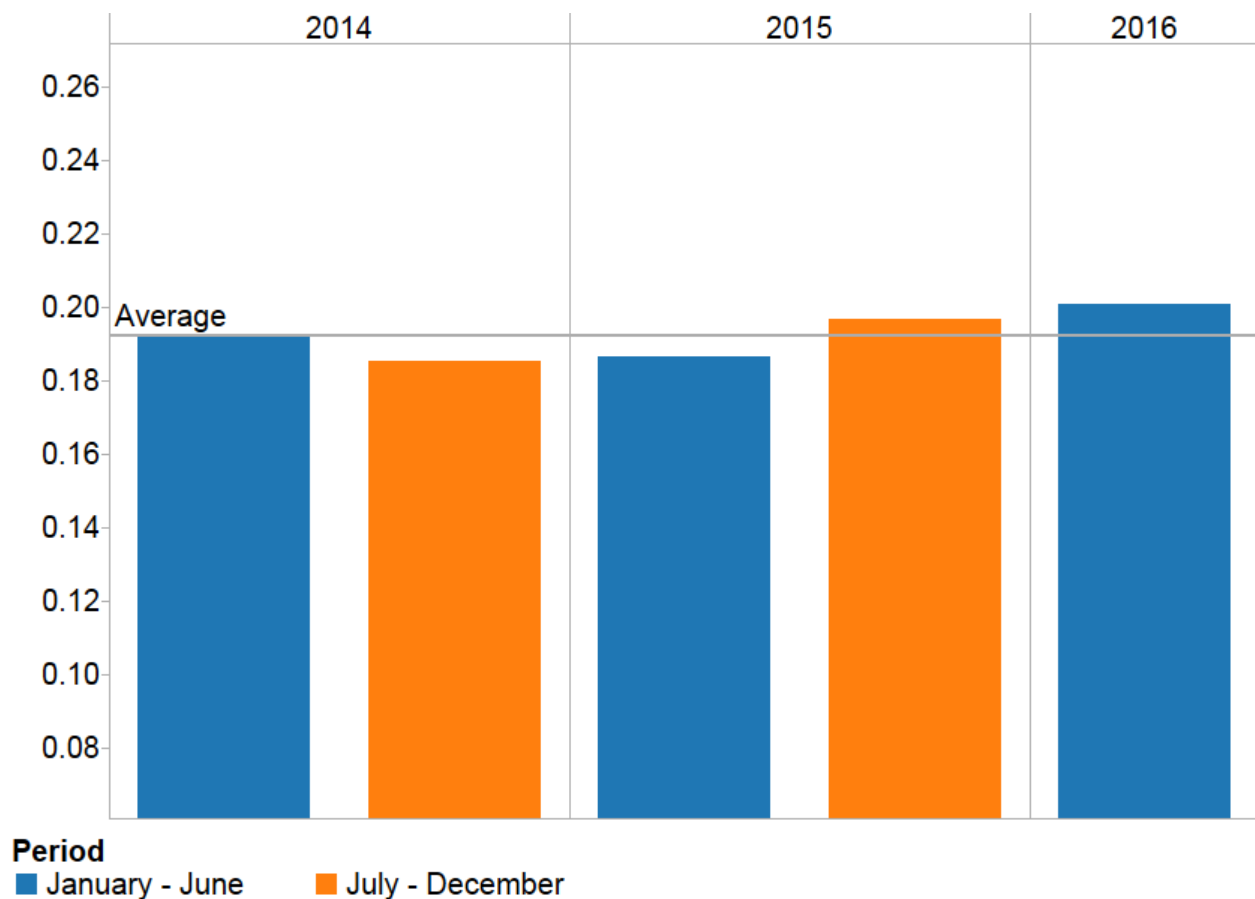
As of June 30 2016, the Library had approximately 248,000 one-year active cardholders. Period 1 of 2016 demonstrated a slight increase in users from Period 2, 2015. Factors that had an impact on the first period in 2016 include:

- Ongoing review and elimination of barriers surrounding account creation through the online registration process;
- Increased public awareness of the OPL due to the Central Library Development Project and regular media coverage relating to library services;

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- Customer database maintenance (i.e. purge of records found to be inactive for a period of three years), and;
- Outreach card registration through special programs like the Bibliobike, Food Literacy Project, and focused efforts to support newcomer Syrian Refugees.

2.   Operational Effectiveness (OE)

OE 1.2 Total Program Attendance per Square Foot

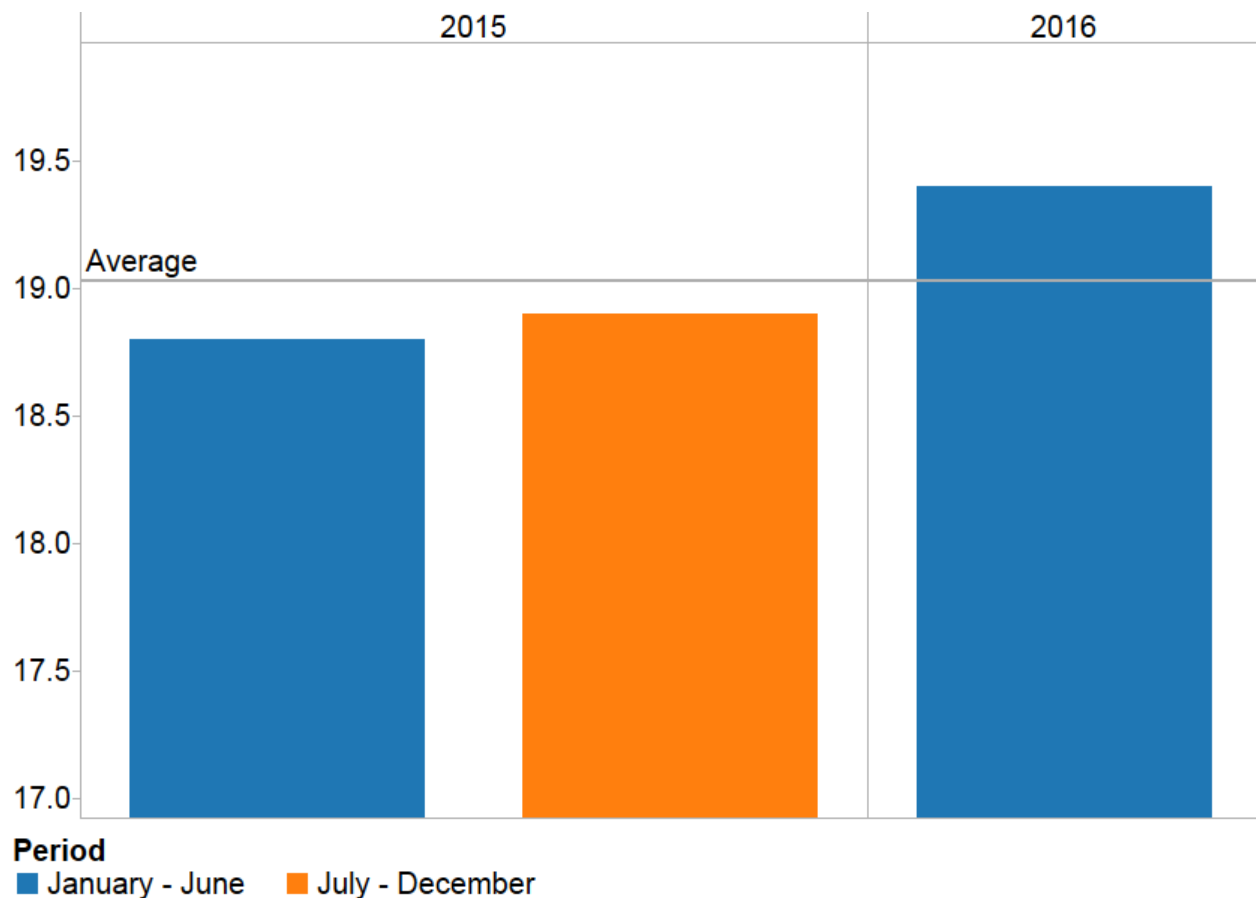[Total in-branch program attendance / total programming space (ft2)]

From January to June 2016, the Library had 85,169 in-branch program attendees. Approximately 0.20 people attended a program per square foot of Library programming space. This number represents a result greater than the average over the last two and half years. Historically, changes in the number of attendees at in-branch programs

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were strongly related to branch closures for the implementation of RFID and staffing capacity at various locations.

The implementation of RFID necessitates closures for short periods of time. During these closures normal program offerings may not be available or are re-scheduled which can have a significant impact on program attendance, as seen at the end of 2014 and beginning of 2015. However, as branches proceed through RFID implementation, we have seen that corresponding changes in the staffing models accompanying RFID have resulted in an increase to the number of programs offered in-branch and through outreach initiatives.

As new spaces are developed through future projects, the ratio of attendees to the amount of space available for programming will help OPL better normalize and assess the popularity of Library programs.

OE 1.3 Percent of Physical Materials Checked Out

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[The average # of items currently checked out divided by the total items available at each branch]

Percent of Physical Materials Checked Out is an operational metric focused on determining the health and responsiveness of the OPL collection. The measure has become increasingly popular in the Library community, and is utilized in other Library systems like Baltimore County Public Library and Hamilton Public Library. One of the strengths of this measure is its ability to inform staff and drive improvement in our daily content decision making.

Near the end of Period 2, 2015, plans were implemented at different branches to identify active and inactive Library collections, and make space on crowded shelves. As a result, Period 1 in 2016 saw an increase of 3.19% in the percent checked out rate with a result of 19.4%.

3.   Financial Stewardship (FS)

FS 1.1 Operating Cost per Library Use
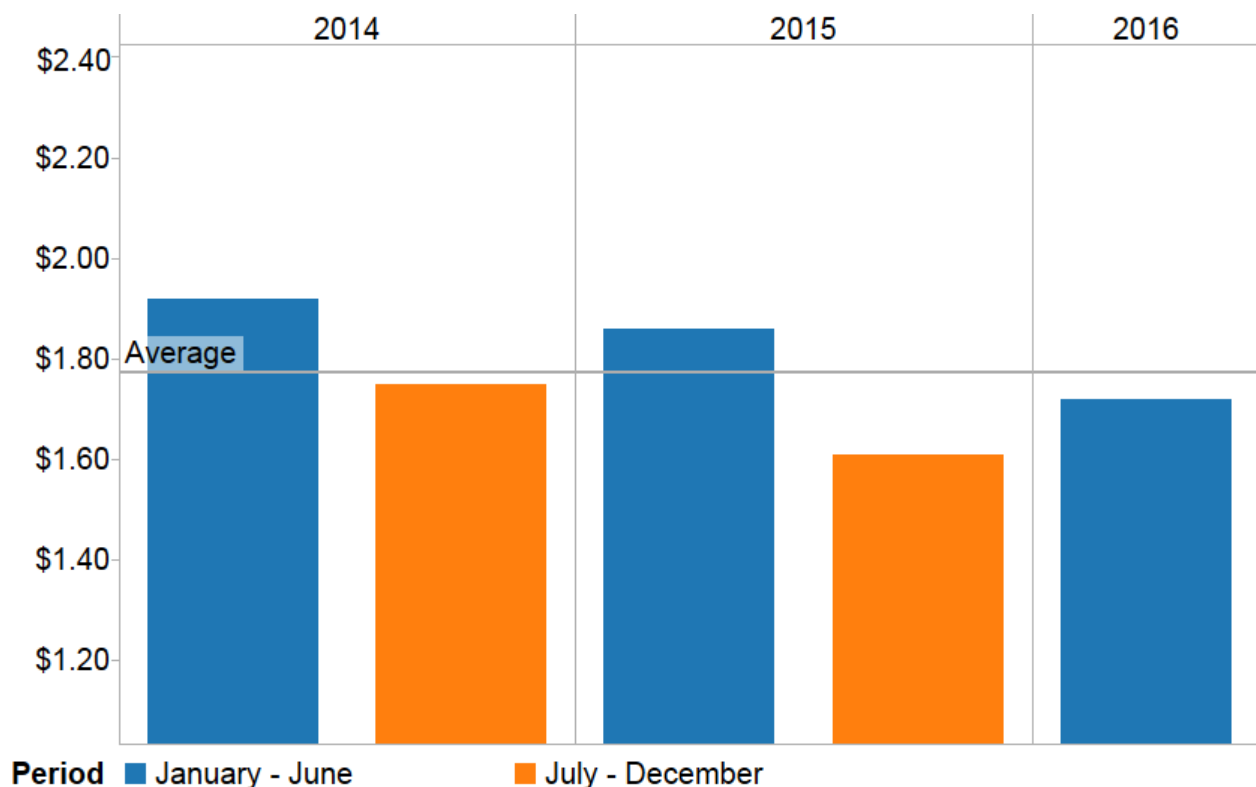
[Cost per library use measures the ratio between operating costs divided by the total number of library uses during the measurement period. In this measure, cost is defined as all costs associated with the day-to-day operation of the OPL.]

Library Use is comprised of total circulation, total program attendance (including outreach), and electronic visits. Cost per Library Use provides a financial picture in terms of people using the library.

From Period 1 2015 through Period 1 2016, cost per use decreased from $1.86 to $1.72. During period 1 2016, increased total program attendance and decreased operational spending (predominantly in materials and supplies and compensation categories) offset declines in circulation and electronic visits as previously addressed in this report.

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 implications associated with this report.

TECHNOLOGY IMPLICATIONS

There are no technology implications associated with this report.

BOARD PRIORITIES

This report is in response to Report #5, Board Governance Review, November 19, 2012, which states "Develop, with Board input as appropriate, improved indicators of

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organizational performance, including objectives and metrics that focus on output, outcomes, and results, and incorporate these into a monitoring process, for Board review and approval as well as the Boards subsequent approval of the Ottawa Public Library PMF in May, 2013."

SUPPORTING DOCUMENTATION

There are no supporting documents for this report.

DISPOSITION

The next semi-annual performance measurement report will be brought to the Board in April 2017. The April report will reflect the measures in this report as well as:

(CES 1.4) Customer Satisfaction Score (New in 2017),

(CES 1.5) Percent of Available Meeting Room Hours Booked (New in 2017), and;

(OE 1.1) Hold Time to Availability (New in 2017).

Further development of (CES 1.6) Communications (New in 2017), will continue in Q4 of 2016, with measurement of the metric planned to start in the beginning of Q1 2017. The first anticipated semi-annual report that will include the new metric is October 2017, after one full measurement cycle is completed.