Report to / Rapport au:

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

April 10, 2018 / 10 avril 2018

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File Number: OPLB-2018-0405

SUBJECT: **SEMI-ANNUAL PERFORMANCE MEASUREMENT – JULY TO DECEMBER 2017**

OBJET: **CADRE DE MESURE DU RENDEMENT SEMESTRIELLE – JUILLET À DÉCEMBRE 2017**

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

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- Services that are customer centric;
- Spaces for community, collections, and creation; and,
- Success through learning, literacy, and innovation.

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 take a holistic view of the overall health of the organization and its performance. In total, the PMF reports on 10 KPIs divided across three categories:

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

Executive Summary

Table 1 shows the Period 2 2017 result, the difference compared to a three year average result for the same period, and the percentage change if applicable.

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Table 1. July – December 2017 KPI Measurement Results Summary

Measure Name	Period 2 2017	Difference	Change
Total Circulation	5,610,405	-45,771	-0.80%
Total Electronic Visits	6,555,851	-583,117	-8.20%
Total Cardholders Active in Last 12 Months	220,071	258	0.10%
Customer Satisfaction Score	65.09	*N/A	*N/A
Percent of Available Meeting Room Hours Booked	34.47	*N/A	*N/A
Hold Time to Availability (Days)	8	*N/A	*N/A
Total Program Attendance per Sq. Ft.	0.2246	0.0202	9.90%
Percent of Physical Materials Checked Out	20.34	*N/A	*N/A
Operating Cost Per Library Use ($)	2.05	0.36	21.30%

*N/A indicates that three year benchmarking results are not available.

A three year average is utilized as a benchmark for comparison to the latest results and is visible in the following KPI charts. Based on this benchmark, there were varying results across five of the 10 measures indicating a relatively static performance for the period. More information on each KPI follow in the respective sections of the report.

General factors influencing performance during Period 2 2017 include enhanced activities and media promotion for OPL's Canada 150 celebrations, branch closures for improvements, the addition of new online resources, as well as the introduction of the high profile Sun Life Financial Musical Instrument Lending Library (MILL).

1. **Customer Satisfaction (CS)**

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

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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 MILL.

Figure 1. Total Circulation
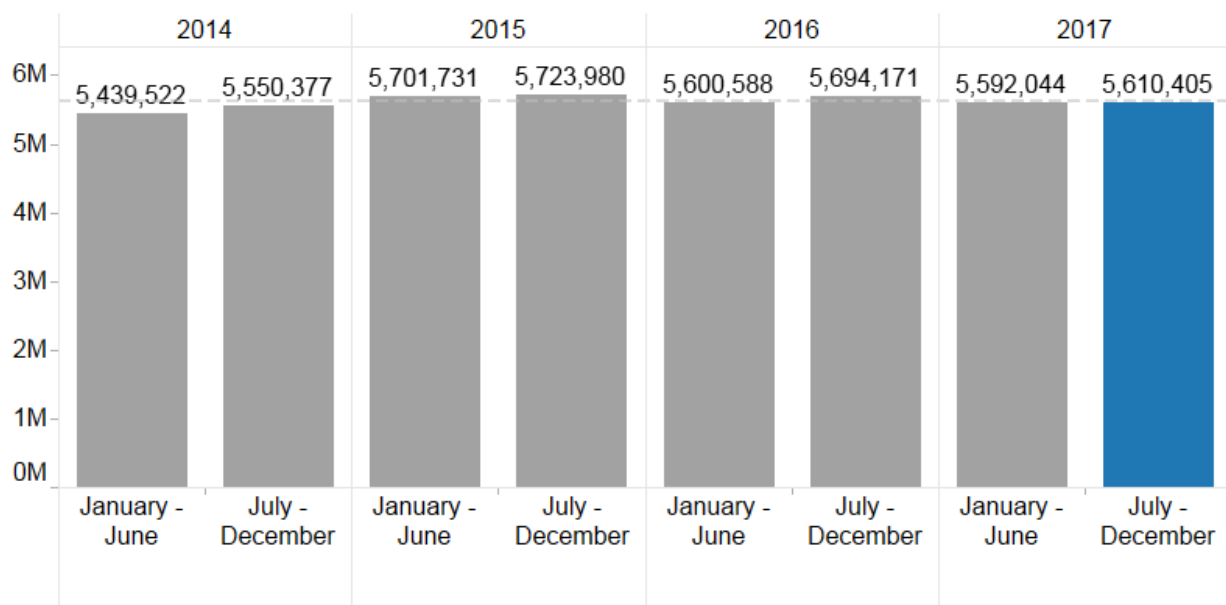
In Period 2 2017, total circulation remained stable at 5,610,405, decreasing less than 1 percent compared to the average of Period 2 results over the last 3 years (5,656,176).

Continued growth in Cloud Library Express eBooks, and Naxos Music Streaming offset the impact of temporary closures for Radio Frequency Identification (RFID) improvements at the North Gloucester and St-Laurent branches. Temporary branch closures should diminish in future periods due to the completion of the RFID project. Close monitoring of total circulation will help to understand the impact(s) of this milestone achievement.

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The addition of ArtistWorks in November 2017 complements the MILL program by providing music instruction through self-paced video lessons produced by artistic professionals. This new streaming service had a marginal impact on the overall circulation result given its launch in November. More meaningful transaction levels are anticipated in subsequent measurement periods.

CS 1.2 Total Electronic Visits

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

Figure 2. Total Electronic Visits
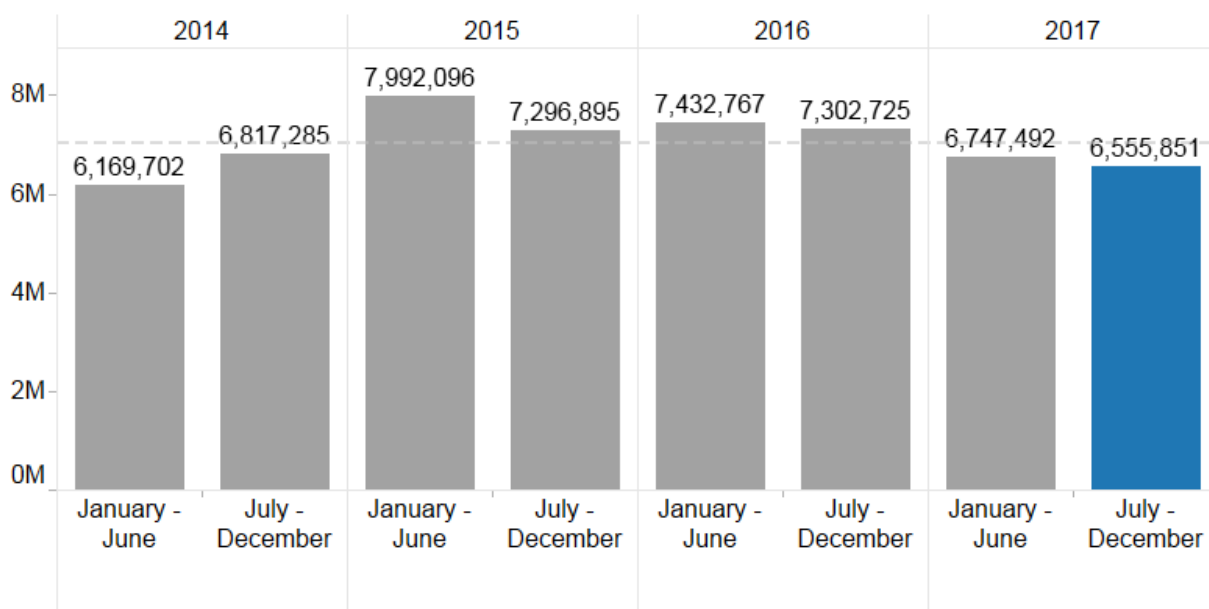
In Period 2 2017, total electronic visits decreased to 6,555,851. Compared to the three year average of Period 2 results, this represents an 8.2 percent decrease. From 2014 to 2016 the average electronic visits during Period 2 (July – December) was 7,138,968.

The decreased number of visits was partially the result of improved integration of third-party e-platforms, such as Overdrive and Bibliocommons. Improved integration requires fewer actions ("clicks") by the customer to access the items offered through these e-platforms. This, in turn, reduces the number of counted sessions generated from customer visits. While fewer actions ("clicks") through better integration may decrease Electronic Visits, this integration also provides for an improved online customer experience.

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A trend supporting continued integration of e-platforms emerged in Period 2 2015 and has persisted through 2017. Total electronic visits should stabilize at a benchmark level moderately lower than the current average if current trend persists, and as more measurement periods pass.

CS 1.3 Total Cardholders Active in Last 12 Months

An active cardholder is 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 card;

- registered for a library program; or,

- logged onto their account via the OPL virtual branch and/or catalogue.

Figure 3. Total Cardholders Active in the Last 12 Months
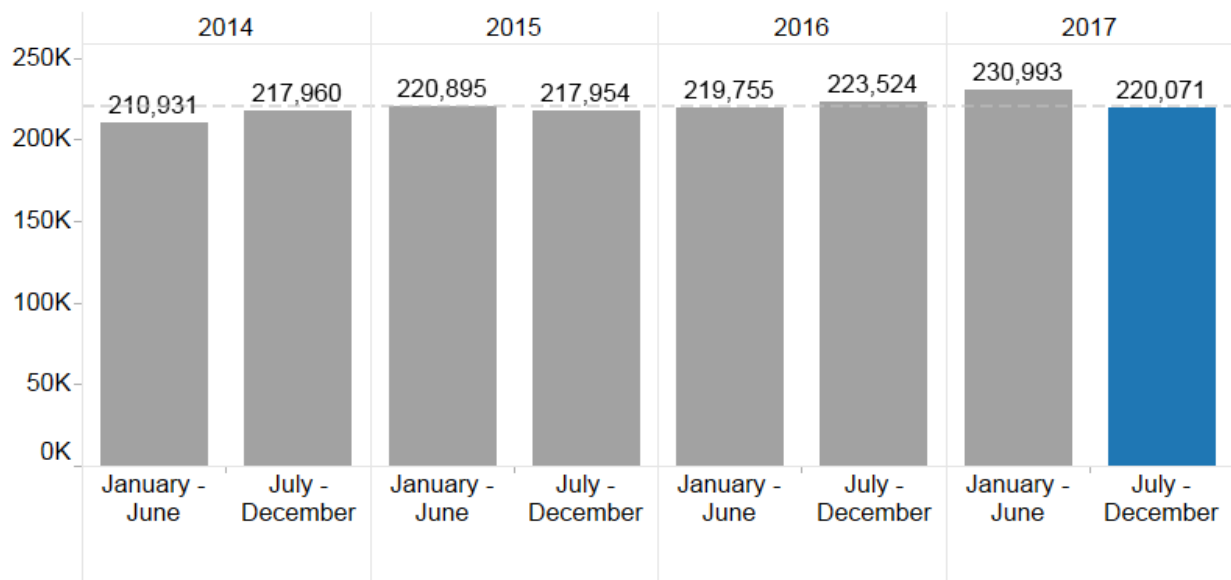

In Period 2 2017, active cardholders remained stable compared to the previous period. The measure surpassed the three year Period 2 average of 219,813 by less than 1 percent, or 258 active cardholders from July-December 2017. Generally speaking, the result for Period 2 2017 is consistent with previous years' performance.

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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 total responses.

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

Figure 4. Customer Satisfaction Score
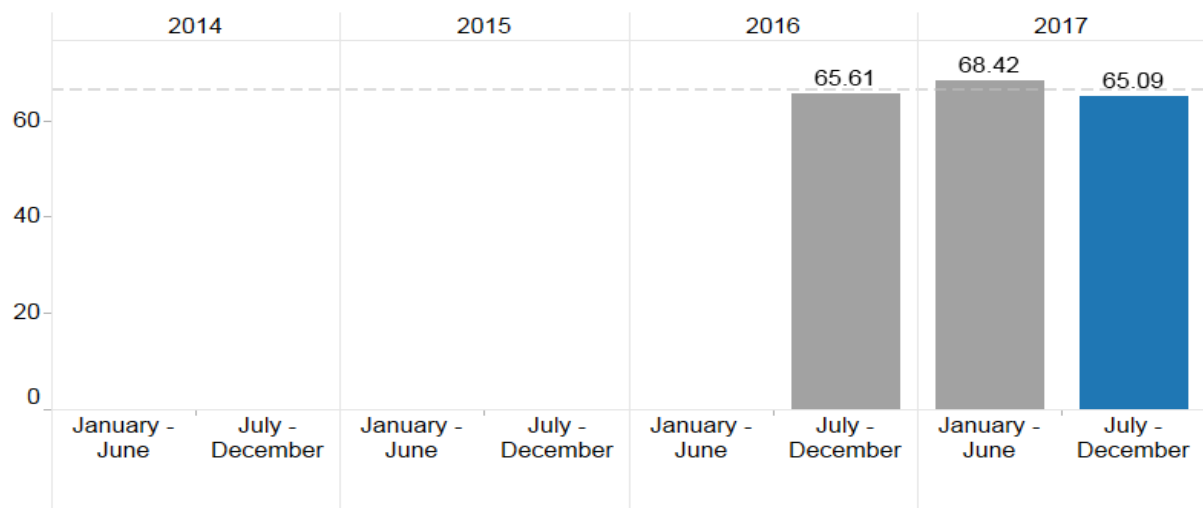
Period 2 2016 was the first reported result for the customer satisfaction score. In Period 2 2017, the cumulative result for July to December was 65.09 percent for 656 responses. Of these, 342 respondents were very satisfied and 85 respondents were satisfied.

When compared to Period 1 2017, a similar proportion of respondents were very unsatisfied (20.73%), or unsatisfied (5.64%), however 1.72 percent more respondents indicated that they were neutral (8.54%).

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A common theme for satisfied customers is appreciation for the services provided by staff while unsatisfied customers frequently identify unavailable museum passes and issues related to fulfillment of customer holds.

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.

Figure 5. Percent of Available Meeting Room Hours Booked
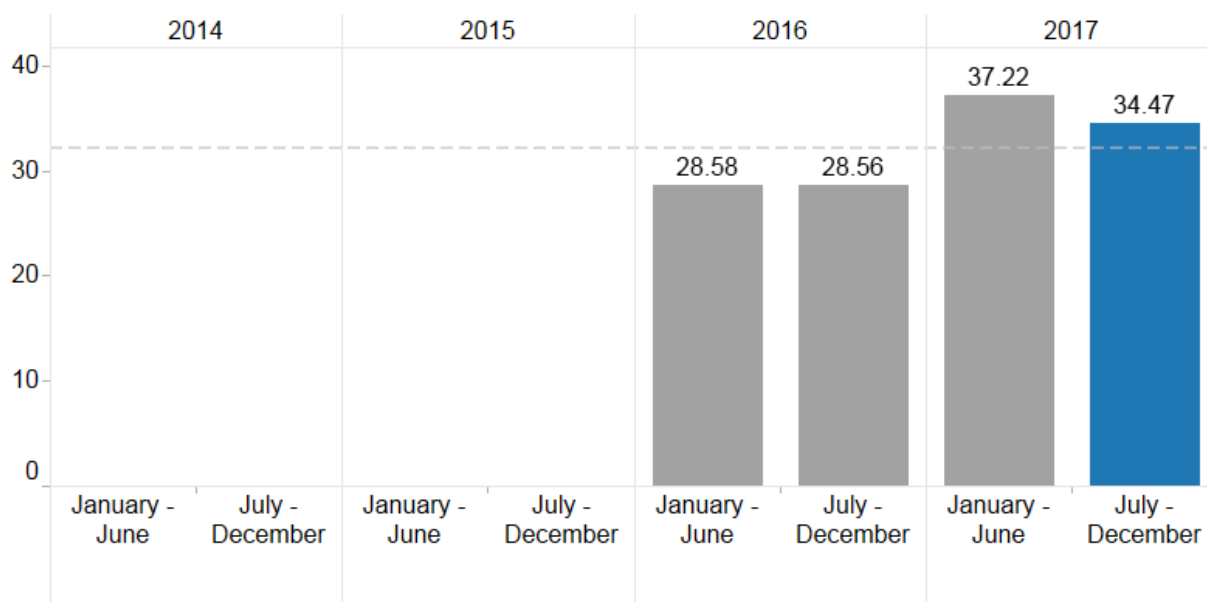
Meeting room usage data became available in 2016 following the introduction of online meeting room bookings and was first reported in April 2017. Period 2 2017 results increased by 20.7 percent compared to Period 2 2016. The results for all previous measurement periods were adjusted in 2017 to include fee exempt bookings including staff and organizations existing to further literacy in the City of Ottawa.

Canada 150 programming likely contributed to the increase in meeting room rental bookings for both measurement periods in 2017. While some themed program events took place external to OPL facilities, more than usual were offered in meeting rooms utilized by staff to ensure program focus and success. A more prominent

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online booking location on the library website may also have contributed to the increased meeting room bookings.

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. This is a new metric that will require additional measurement periods to establish a trend for performance.

Figure 6. Reach and Awareness Ratio
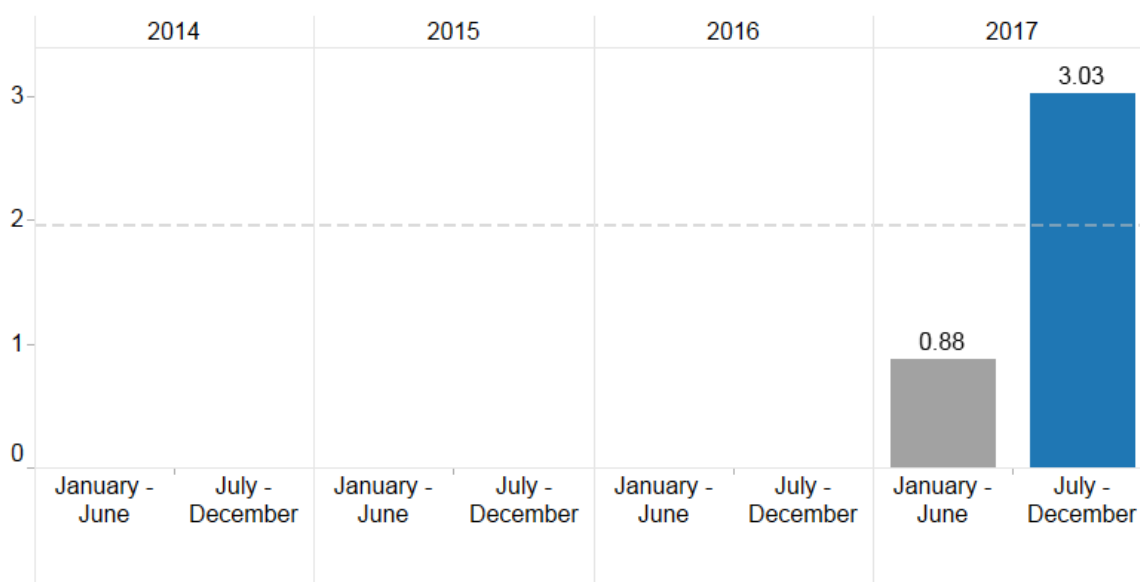
In 2017, OPL started to monitor and track external news and social media mentions using a comprehensive, consolidated, and centralized tool. The new capability complements internal social media monitoring by providing a new way to track media commentary.

During Period 2 2017, coverage included events surrounding Canada 150, to public concerns regarding OPL's Public Network Access Policy and Meeting Room Rental Policy and Practices. In total, there were 9,599 posts generated by both OPL and

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customers that mentioned the Library. 7,216 posts were generated externally across multiple social media platforms (including news sources). 2,383 posts were published from OPL directly.

As a generator of content throughout 2017 (both Periods 1 and 2), OPL has produced more than 5,000 posts, or an average of 14 per day.
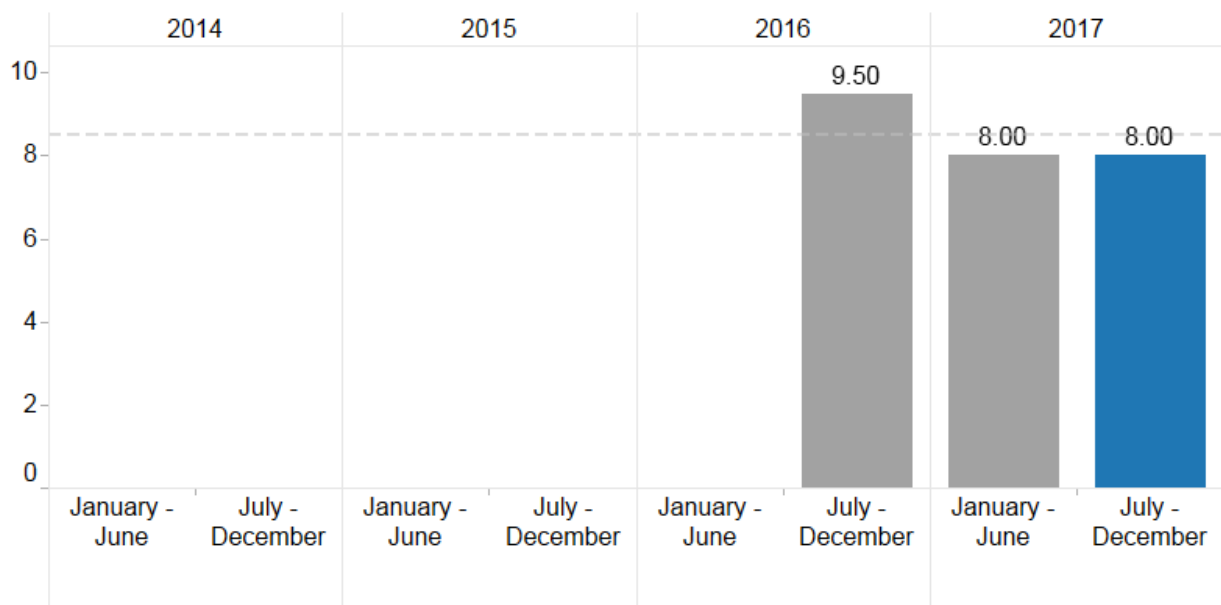
2. Operational Effectiveness (OE)

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.

Figure 7. Hold Time to Availability

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Period 2 2016 was the first result for the hold time to availability measure. In Period 2 2017 the result was 8.00 days, a decrease of 1.5 days from Period 2 2016 or a decrease of 19 percent.

Many factors contribute to the median time. These factors include centralized manual materials processing and the Automated Materials Handling unit (AMH), transport time to and from the branch, and localized processing time in branch. In 2017 (both Periods 1 and 2) consistent volumes of transported materials resulted in stable measure results.

OE 1.2 Total Program Attendance per Square Foot

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

**Figure 8. Total Program Attendance per Square Foot**
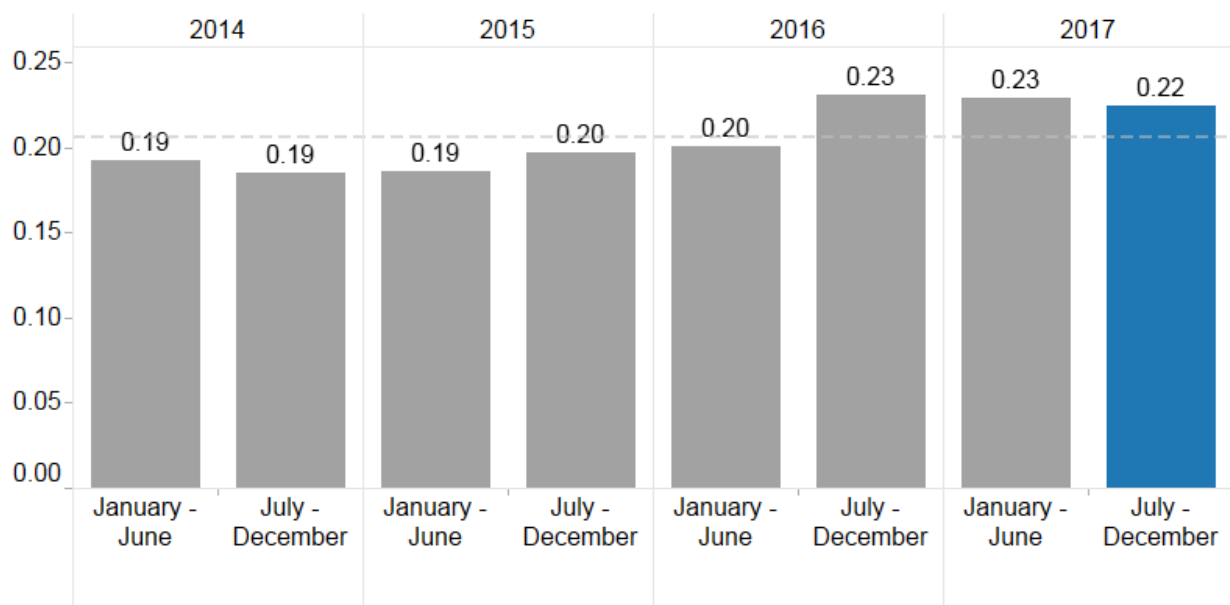
In Period 2 2017, the measure decreased to 0.22. While declining, this result still surpasses the three year Period 2 average (0.20) by 0.02 attendees per square foot. This KPI considers only internal programming spaces at library facilities and does not take into consideration programs offered at other locations such as community centers or external grounds.

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A higher than average result in 2017 (both Periods 1 and 2) are, in part, a product of popular thematic programming events related to Canada 150 celebrations. The primary event related to Canada 150 in Period 2 was the Dominion Day Strawberry Social. The event experienced excellent attendance rates but the majority of activities were held on external grounds and do not have an impact on this KPI. This may be the reason for the 0.01 decline from Period 1 to Period 2. The annual TD Summer Reading Club (SRC) program also saw historic rates of participation.

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.

Figure 9. Percent of Physical Materials Checked Out
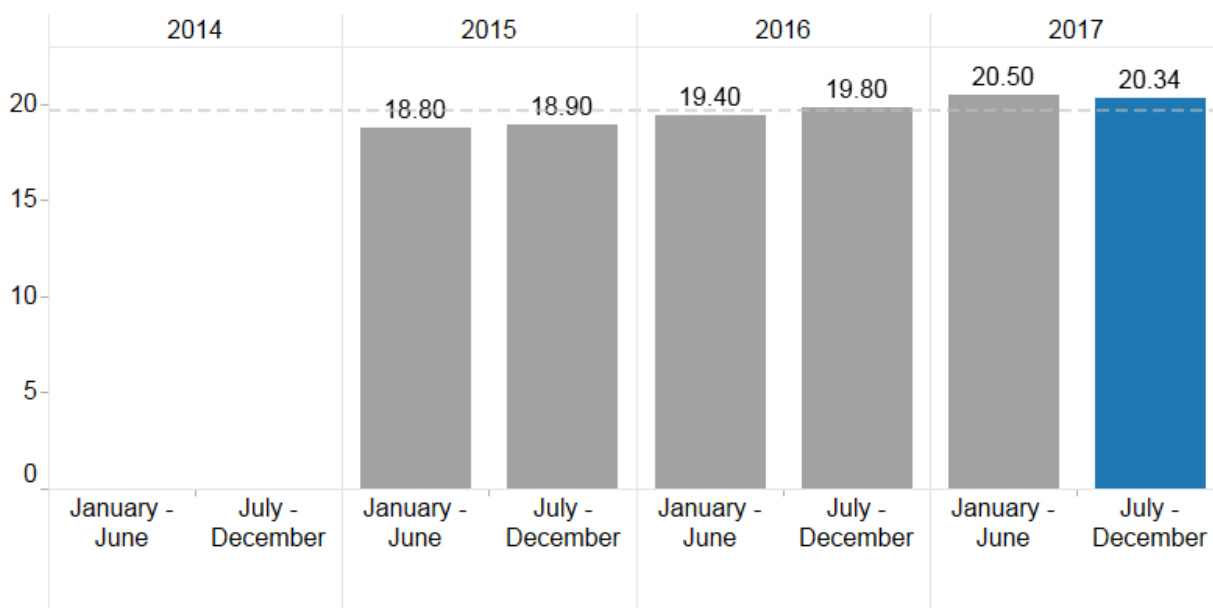
In Period 2 2017, the measure remained stable at 20.34 percent. Results reflect a small increase over the two year average of 19.35 percent.

Revised collection management practices focusing on material popularity and relevance continue to be a priority at all OPL branches and services. In some cases, materials no longer meeting a minimal circulation threshold are removed from the collection and offered to the Friends of the Ottawa Public Library (FOPLA) for

resale.   The Memorandum of Understanding (MoU) between the OPL and FOPLA details this process.

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.

Figure 10. Operating Cost per Library Use
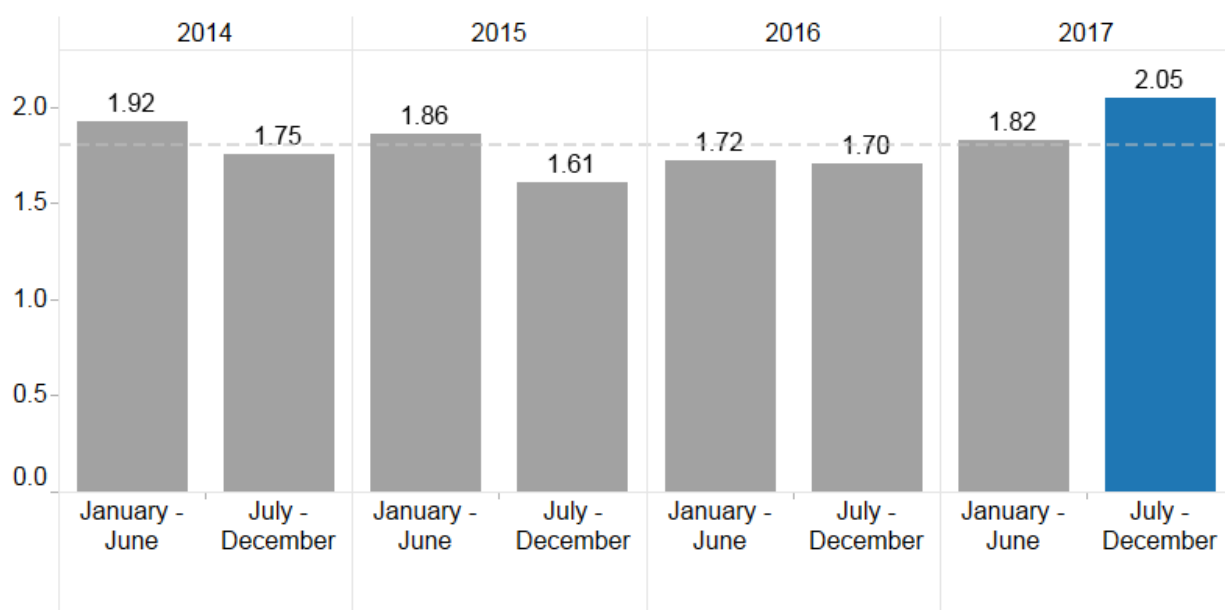
OPL's Operating Cost per Library Use increased in Period 2 2017 by $0.23 per library use.

As per the KPI definition, this measure is affected by two factors, library uses and operational costs.   Library uses include circulation, electronic visits, and program attendance.   Cumulatively, circulation and electronic visits decreased by 630,000 in Period 2 2017.   During the same period, the availability of external funding including OPL's food literacy program and the MILL program in Q3 and Q4 meant that increased operational spending was possible.   The combination of higher

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expenditures and lower library uses in the same measurement period resulted in the increased cost per use result. It is anticipated that this measure will return to near average values in the next measurement period.

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