

Report to / Rapport au:

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

April 11, 2017 / 11 avril 2017

**Submitted by / Soumis par:
Monique Désormeaux, Deputy Chief Executive Officer / Directrice générale
adjointe**

*Contact Person / Personne ressource:
Matthew Pritz, Manager, Finance and Business Services,
Chef de Services des affaires et entreprises
(613) 580-2424 x 12727 Matthew.Pritz@BiblioOttawaLibrary.ca*

File Number: OPLB-2017-0401

SUBJECT: Semi-Annual Performance Measurement - July to December 2016

**OBJET: Cadre de mesure du rendement semestrielle - Juillet à Décembre
2016**

REPORT RECOMMENDATIONS

That the Ottawa Public Library Board:

- 1. Approve the introduction of the Communications measure in April 2018;
and,**
- 2. Receive this report for information.**

RECOMMANDATIONS DU RAPPORT

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

- 1. Adopte l'introduction de la mesure de communications en avril 2018; et**
- 2. 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. On April 12, 2016, the Board approved an updated list of Key Performance Indicators (KPI). The new list was approved to more accurately align performance measures with the OPL's Strategic Directions:

- Services that are customer centric,
- Spaces for the 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.

The July-December 2016 (Period 2) report features six KPIs from the previous semi-annual performance report and introduces three new measures. In total, there are 10 KPIs divided across three categories, of which nine are reported in this period.

1) Customer Satisfaction (CS):

(CS 1.1) Total Circulation;

(CS 1.2) Electronic Visits;

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

(CS 1.4) Customer Satisfaction Score (NEW);

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

(CS 1.6) Communications (NEW).

2) Operational Effectiveness (OE):

(OE 1.1) Hold Time to Availability, (NEW);

(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

The introduction of the KPI for Communications was approved by the Board in 2016, with an implementation planned release date set for 2017. Staff have been working to establish the necessary departmental alignments with respect to reporting on this broad measurement, however, further refinement of the methodology and tracking is required. Staff now recommend that the deadline to introduce the Communications measurement be extended to April 2018.

Executive Summary

Period 2 2016 results were stable across the majority of KPI measures. Notable exceptions are seen in the results for Program Attendance per Square Foot and Percent of Physical Materials Checked Out. The addition of three new measures in this report provides an opportunity for performance evaluation concerning customer satisfaction, library spaces, and the popular holds service.

Table 1. July - December KPI Measurement Results Summary

Measure Name	Period 2 2015	Period 2 2016	Difference	Change +/-(-)
Total Circulation	5,723,980	5,694,171	-29,809	(0.52%)
Electronic Visits	7,296,895	7,302,725	5,830	0.08%
Total Cardholders Active In Last 12 Months	217,954	223,524	5,570	2.56%
Customer Satisfaction Score	N/A	65.61	N/A	N/A
Percent of Available Meeting Room Hours Booked	N/A	15.85	N/A	N/A
Hold Time to Availability (Days)	N/A	9.5	N/A	N/A

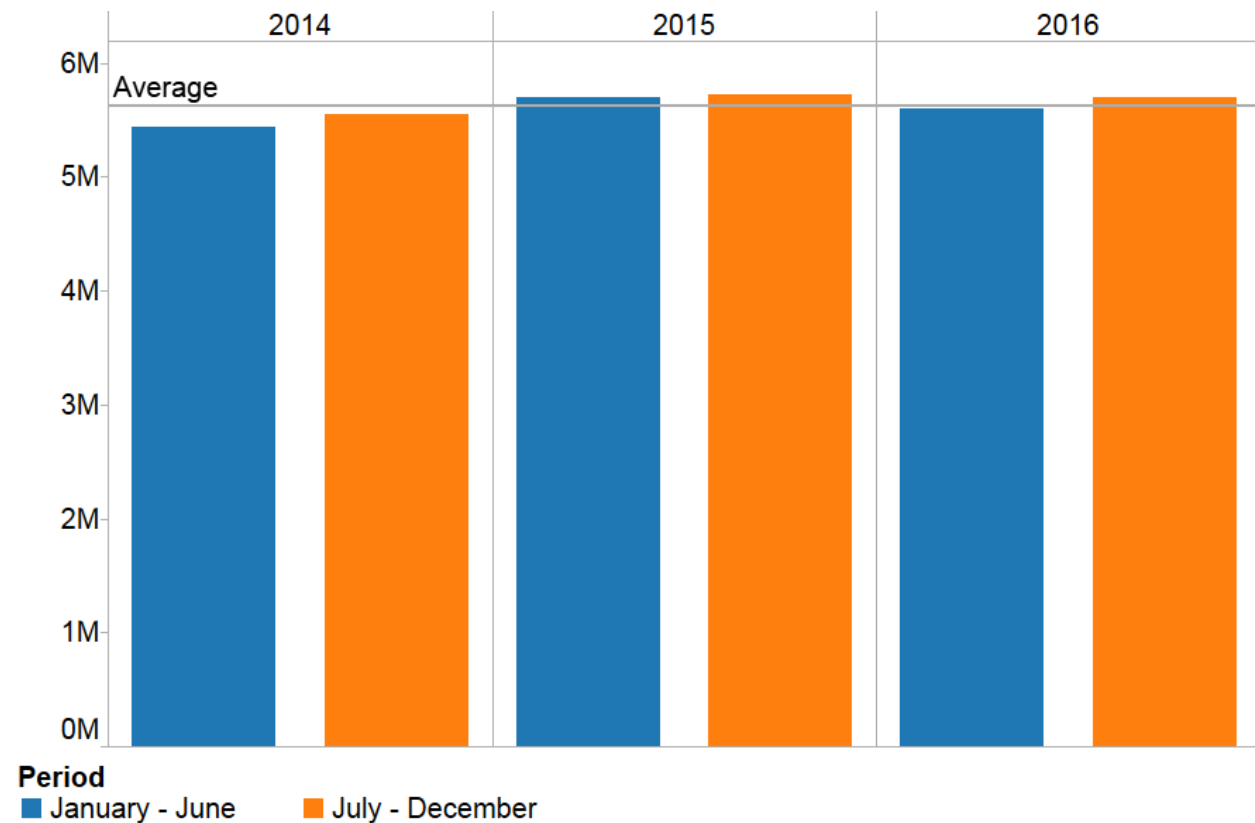
Total Program Attendance per Square Foot	0.20	0.23	0.03	15.00%
Percent of Physical Materials Checked Out	18.9	19.8	0.90	4.76%
Operating Cost Per Library Use (\$)	1.61	1.70	0.09	5.59%

1. Customer Satisfaction

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)

Figure 1: Total Circulation



[Total Circulation includes first-time circulation, renewals, streaming services and digital downloads. Digital downloads include Overdrive, Zinio, Freegal, and MaBiblio.

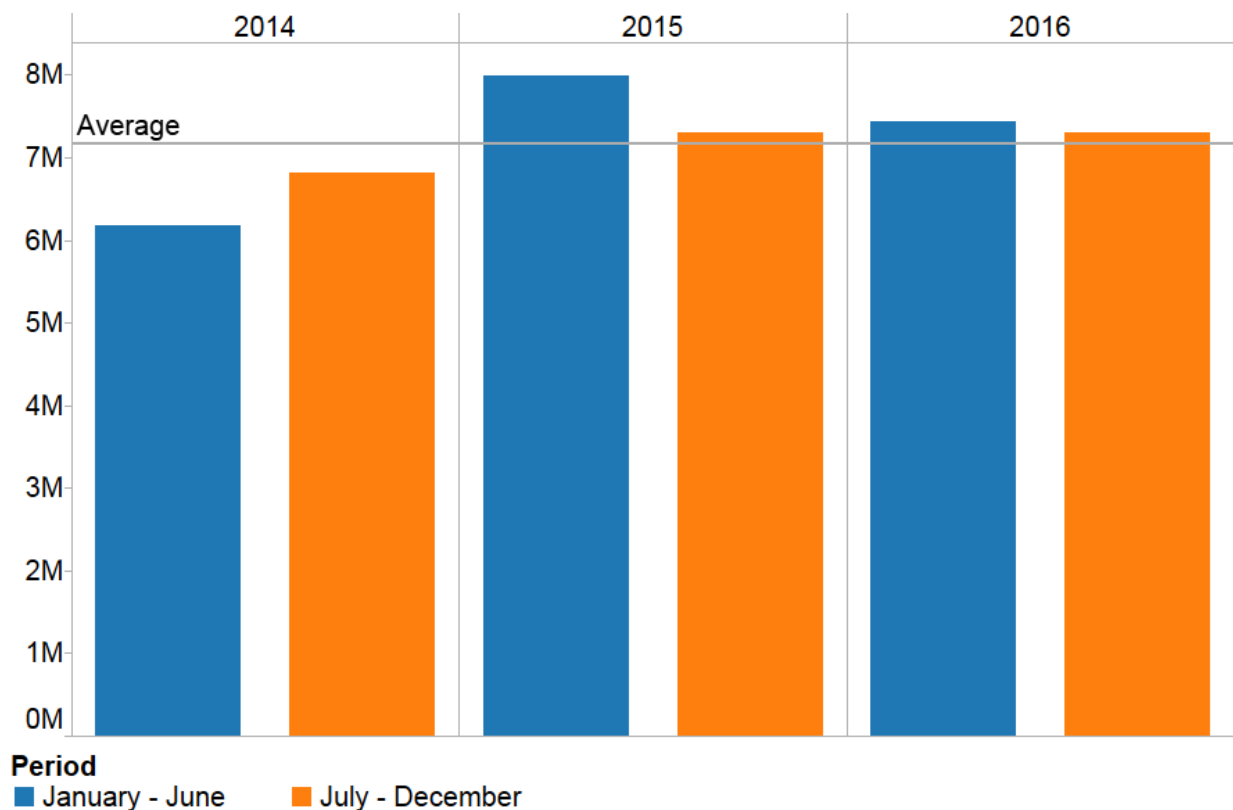
Streaming services include of Freegal, Hoopla, Naxos, Lynda.com, and Access Video on Demand (AVOD).]

Figure 1 shows that Total Circulation remained steady in Period 2 from 2015 to 2016. The Total Circulation for Period 2 2016 was 5.69 million.

There were several factors that influenced Total Circulation in the reporting period. Seasonal borrowing trends remained consistent with normal back-to-school and holiday impacts. Downloading and streaming resources such as e-books, movies, and music continue to be popular. The new bookmobile introduced to the fleet in October has provided consistent service, a larger collection of library materials, and has strengthened results compared to 2015 when some stops were served by the mini-bookmobile. Construction projects at Centennial, Manotick, North Gower, Rideau, and Stittsville branches caused some service interruptions and impacts on circulation.

CS 1.2 Electronic Visits

Figure 2: Electronic Visits

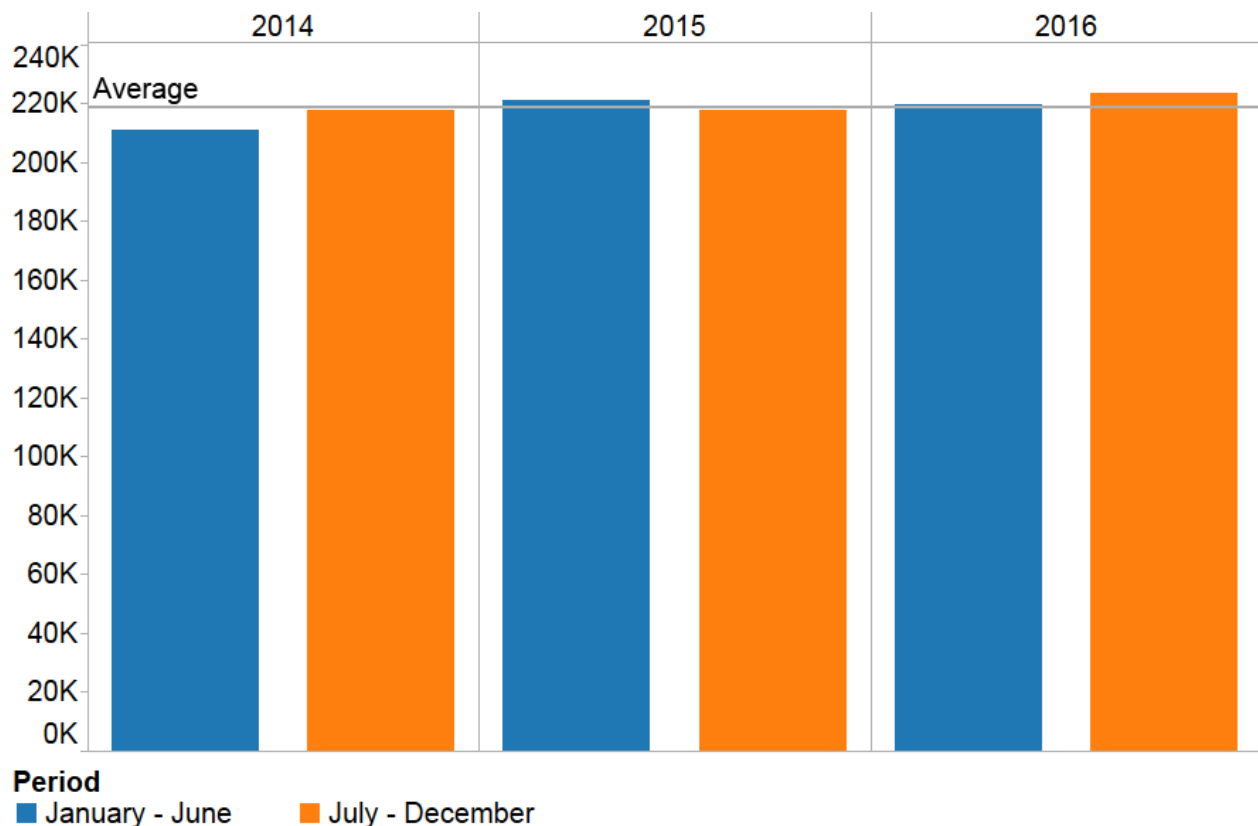


[Electronic Visits (sessions) include when customers access the library's website, catalogue, and databases through network or wireless means.]

Figure 2 shows the number of Electronic Visits by period from 2014 to 2016. Results are consistent since 2015 when changes to measurement definitions and database systems were introduced. Previous performance reports detail the changes made in the counting methodology for Electronic Visits which were largely out of the span of control of the OPL. Nevertheless, Electronic Visits remain stable and continue to represent a major service delivery avenue for the library system. The total Electronic Visits for Period 2 2016 was 7.3 million.

CS 1.3 Total Cardholders Active In Last 12 Months

Figure 3: Total Cardholders Active In Last 12 Months



[An active card holder is 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;
- reserved library material or a computer;
- registered for a library program; or,

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

Figure 3 exhibits Total Cardholders Active in the last 12 months from 2014 to 2016. This measure has remained steady throughout the period with no significant declines. The result for Period 2 2016 was 223,524 active cardholders.

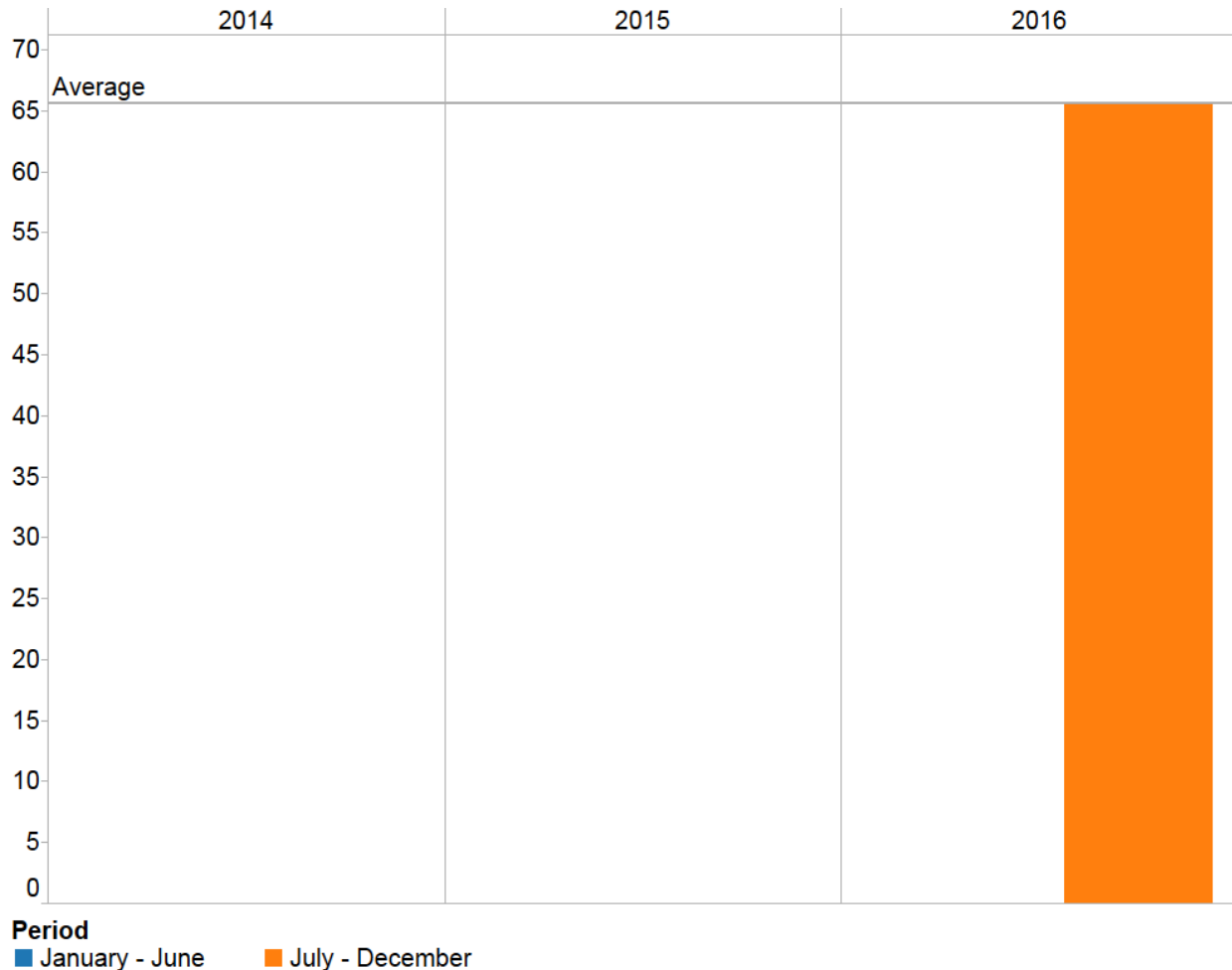
Factors that may have influenced the result in Period 2 2016 include increased promotions for Library Month, and additional programming offered during school board Professional Development (PD) days. Central Library Development activities increased public awareness of the Library and may have also contributed to the improved result.

Finance and Business Services have revised the results in Figure 3 for Period 2 2015 from 246K down to 219K and for Period 1 2016 from 248K down to 219.5K. It was discovered that system maintenance of the customer database in 2015 incorrectly reactivated a number of previously inactive users. This error caused an overstatement of results in those periods. After adjusting results for the measure in these periods, active cardholder counts remain consistent.

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CS 1.4 Customer Satisfaction Score (New)

Figure 4: Customer Satisfaction



[The Library bases its Customer Satisfaction Score on respondents' most recent experience online or in a branch. The measure uses a 1-5 scale where one represents very unsatisfied, and five represents very satisfied. The final result is the number of respondents selecting four and five as a percentage of the total responses.]

Each period, survey responses are collected through the OPL website after online transactions and in eight branches. The survey consists of one simple question "Please rate how satisfied or unsatisfied you are with your most recent experience." Responses are submitted through the OPL website. In branches, responses are collected using satisfaction stations distributed to four locations each quarter. Branches hosting satisfaction stations are chosen to represent sites of different sizes and geography in each quarter.

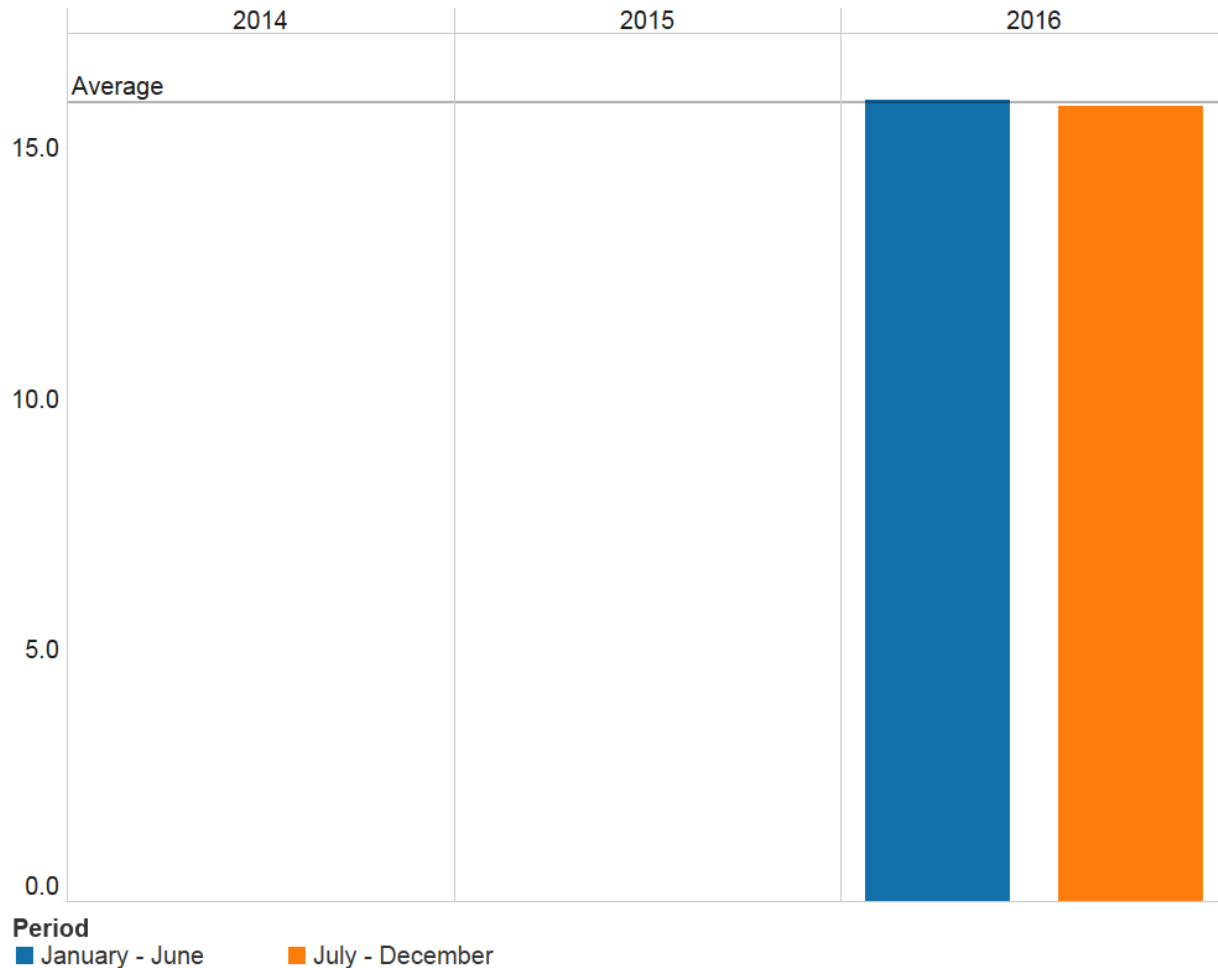
Period 2 2016 is the first measurement period to report on customer satisfaction. A total of 1,044 responses were collected which resulted in an overall satisfaction score of 65.61 percent. Satisfaction scores varied across the online and in-branch channels. In-branch customer experiences brought higher satisfaction ratings than online response channels. Online responses were lower in November and December 2016, with most frequent dissatisfaction comments pertaining to the introduction of the redesigned OPL website.

The reception of the redesigned website by OPL customers indicates less positive response to a changed major library service stream. That said, overall Electronic Visits for the same period remained above the three-year average. This would indicate that while customers were not immediately satisfied with the website redesign, demand and usage of online services remained steady. Staff will continue to monitor customer feedback regarding the website, and ensure increased notification periods and change management messages for future changes to library service delivery.

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CS 1.5 Percent of Available Meeting Room Hours Booked

Figure 5: Percent of Available Meeting Room Hours Booked



[The total number of meeting room hours booked divided by the total meeting room hours available.]

Libraries provide places for people to meet, hold community events, or attend an event organized by the Library. Meeting rooms are a community-focused service that is increasingly relevant to libraries of the future. This measure reports on meeting room bookings including literacy groups as well as staff and city colleagues. Generally, sixty percent of all meeting room bookings are for non-paying, or waived, parties and the remaining forty percent generate revenue.

As part of the 2016 budget process, the Ottawa Public Library Board (OPLB) approved the re-structuring of meeting room rental periods from four-hour blocks of time to one-

hour blocks. Accordingly, rates charged per hour were adjusted to one-quarter of the previous rates. This adjustment increased the potential availability of meeting rooms by approximately 300 percent. Resulting revenues in 2016 for these short-term rentals increased from \$74,638 to \$81,332, an increase of nearly nine percent. This revenue stream also outperformed the budget plan in 2016 even with the implementation of the revised rental periods occurring in June 2016.

Period 2 2016 is the first measurement period to report on this KPI. During 2016, the Percent of Available Meeting Room Hours Booked was 15.97 percent in Period 1 and 15.85 percent in Period 2. During Period 2, there were 44,543 available one-hour timeslots for meeting room bookings, with 7,164 hours utilized. Of this, 2,663 were revenue generating and 4,501 were non-revenue generating (i.e. bookings with the fees waived according to Library policy).

Analysis shows that the most popular periods for meeting room bookings were between 10:00 a.m. and 6:30 p.m. There remains available time for meeting room bookings both during peak hours, and during morning and evening periods. This availability of 37,379 hours represents an opportunity for revenue growth. Continued measurement of this KPI will inform the organization on opportunities to further promote the availability of meeting room spaces for community activities.

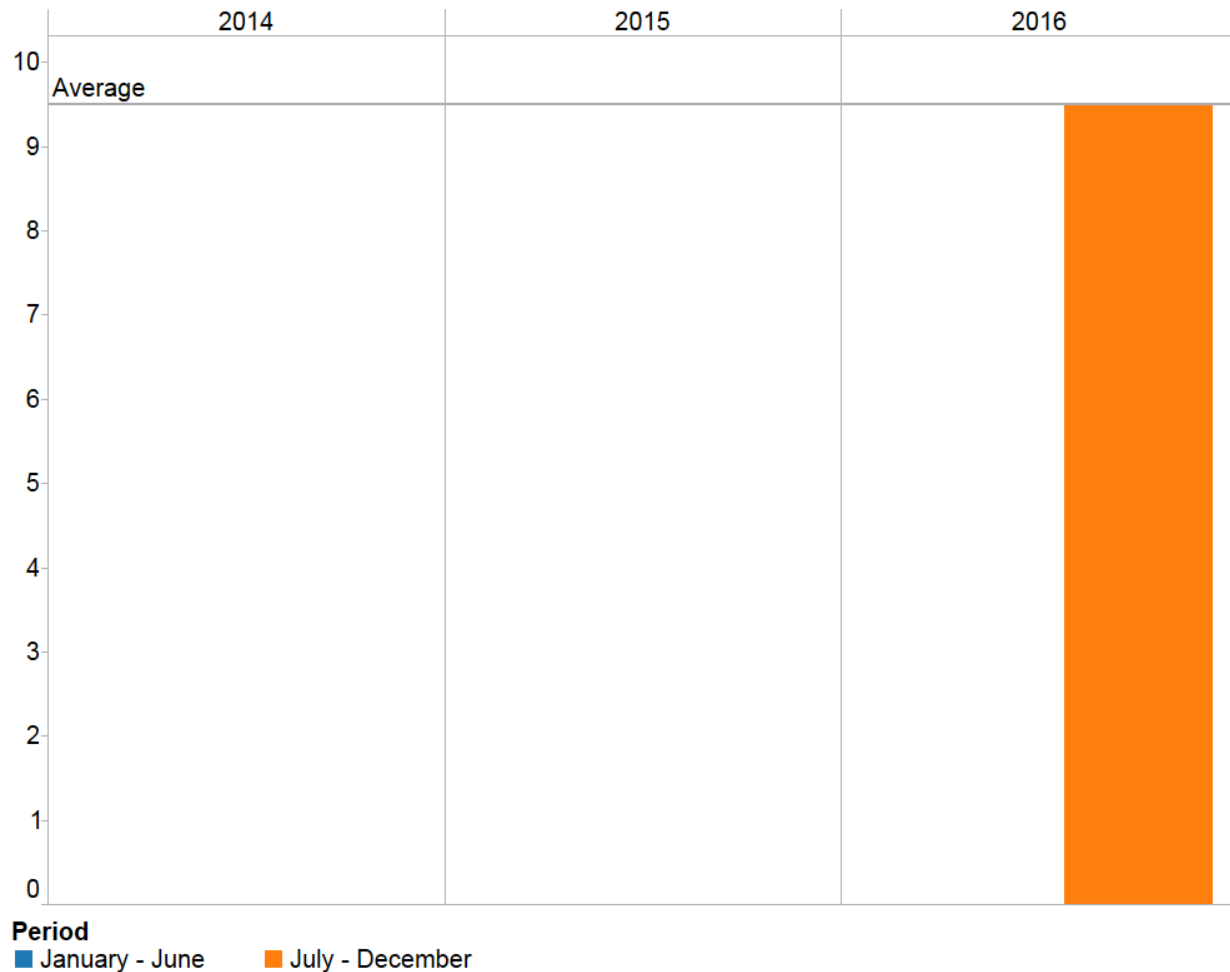
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2. Operational Effectiveness (OE)

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

OE 1.1 Hold Time to Availability

Figure 6: Hold Time to Availability



[Hold Time to Availability measures the median average days from the time a hold is placed electronically, to the time it is available at a branch for pick up, for all holds that are checked out in a month]

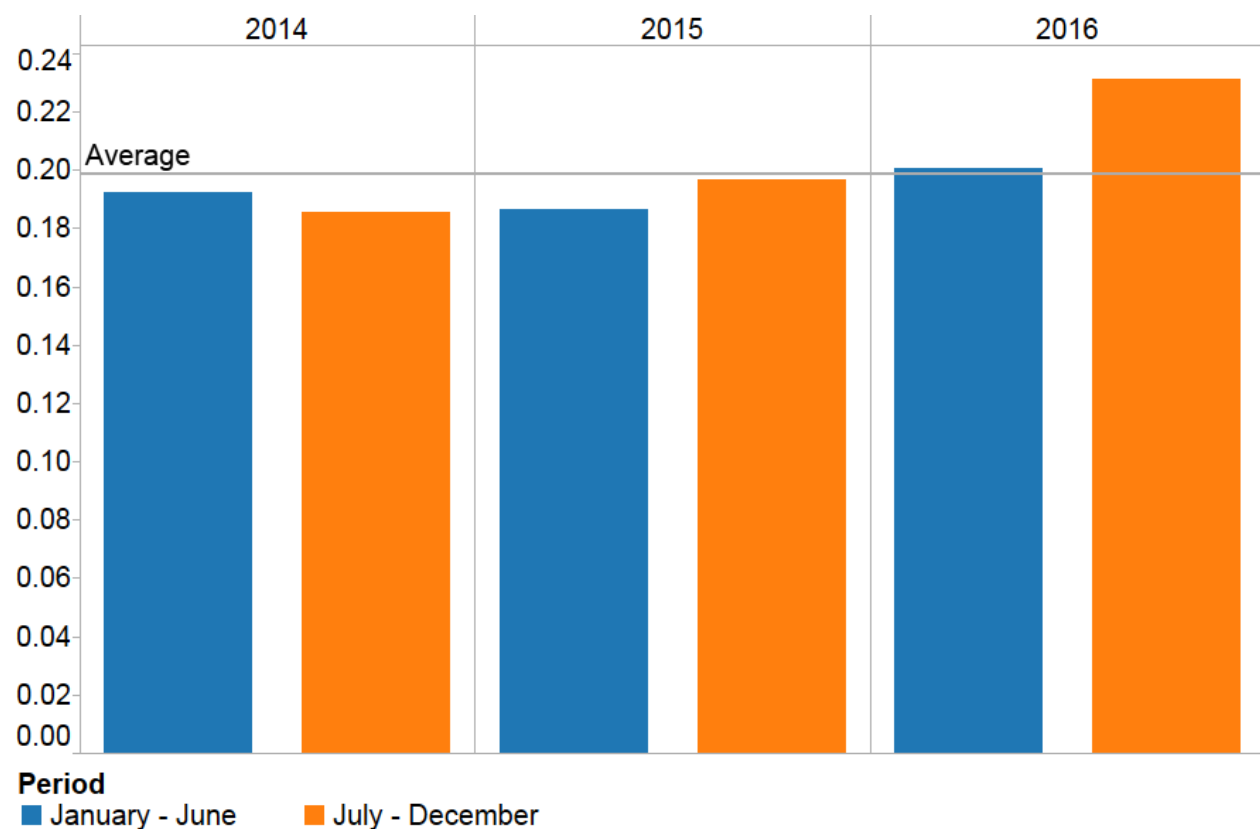
Holds are a popular service to which many departments in the organization contribute. Content Services, Materials Handling, Technology Services, and Branch Operations all

have an impact on the result of this KPI, making the measurement relevant to operations.

Period 2 2016 is the first measurement period to report on this KPI. During the period approximately half of all the holds filled, more than one million items, were available for pick up in 9.5 calendar days or less. Staff will continue to monitor this measurement over the next period and establish a benchmark for comparison.

OE 1.2 Total Program Attendance per Square Foot

Figure 7: Total Program Attendance per Square Foot



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

Figure 7 illustrates the Total Program Attendance per Square Foot from 2014 to 2016. During Period 2 2016, the measure result was 0.231, up 17.48 percent from Period 2 2015.

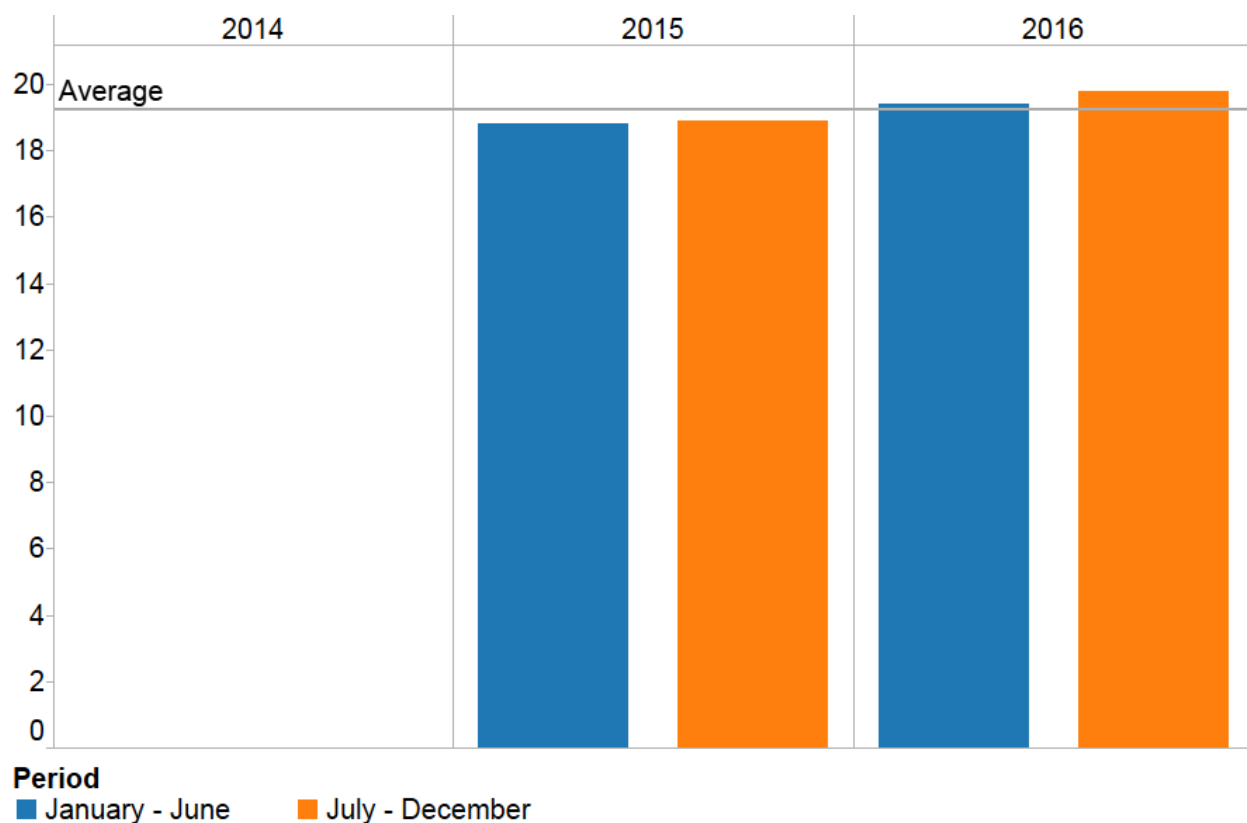
Programs provide an opportunity for staff and community members to create social connections, explore ideas, and learn at the library. Looking at programming and its

relationship to available space helps to ensure we are efficiently using our physical resources. Understanding the relationship between library space and programs is important as we view libraries as conduits for community learning.

During Period 2 2016, increased program attendance was the result of augmenting the number of programs offered during PD days as well as unscheduled impromptu children and family programs during regular branch hours at select branches.

OE 1.3 Percent of Physical Materials Checked Out

Figure 8: Percent of Physical Materials Checked Out



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

Figure 8 shows the Percent of Physical Materials Checked Out. The measure has experienced steady growth from 2015 to 2016 with the result for Period 2 2016 of 19.8 percent.

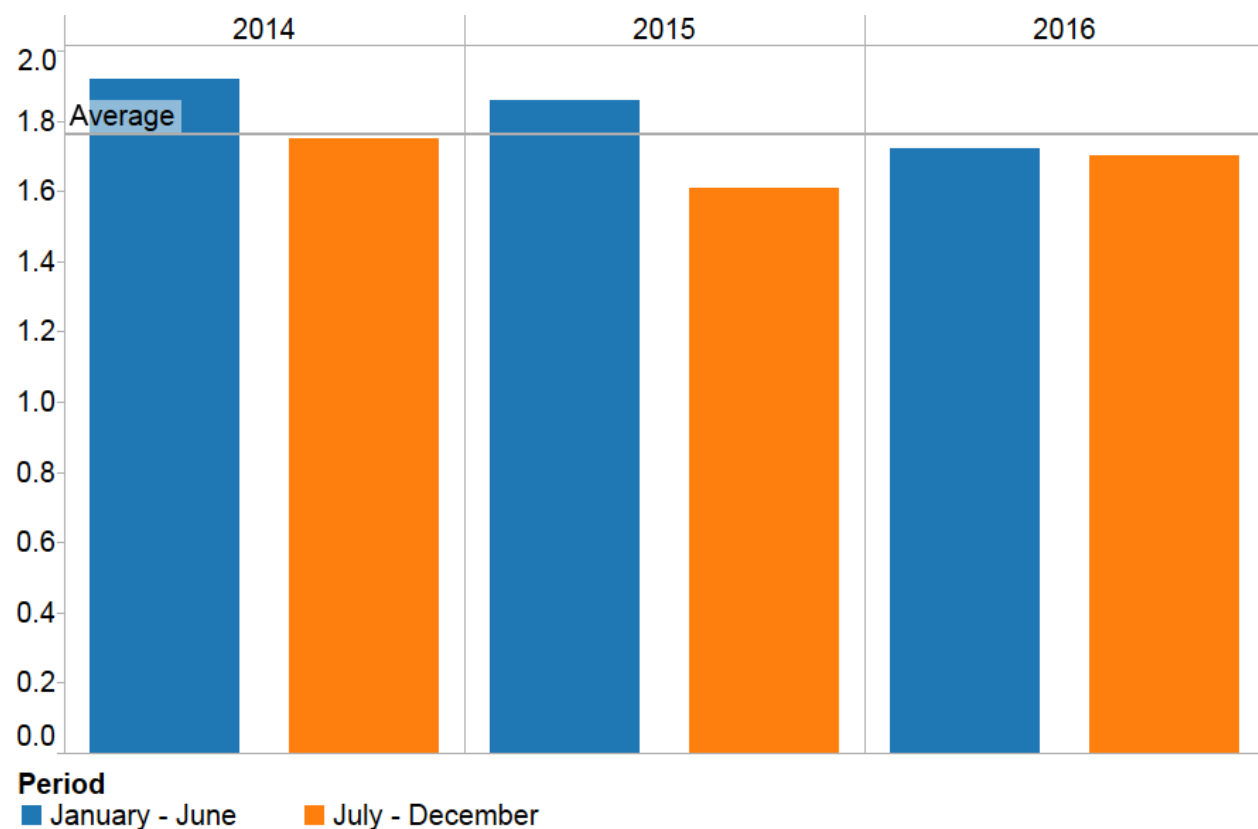
An increase in the Percent of Physical Materials Checked Out indicates that circulating library materials are relevant and available to more library customers. The success of this measure is the result of continued content evaluation activities under the guidance of Content Services and collaboratively between library branches. The measure focuses on providing new materials to customers, and on reducing or removing materials no longer suitable for circulation based on collection management framework.

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

Figure 9: 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.]

Figure 9 highlights operating cost per use results from 2014 to 2016. During this period of time, the average cost per use is \$1.76. The result for Period 2 2016 was \$1.70.

In 2016, operating expenditures remained consistent across both measurement periods, contrary to 2015 results when pay equity charges realized in June drove the cost per use up to almost \$1.90. Cost per use over the longer term has decreased, which is particularly good news given it counters inflationary trends. In Period 2 2016 there was a 5.64 percent increase from the same Period in 2015. The increase can be partially explained by a spending and hiring freeze implemented to control costs as a mitigation that reduced operating costs.

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.

SUPPORTING DOCUMENTATION

There are no supporting documents for this report.

DISPOSITION

If approved by the OPL Board, further development of CES 1.6 Communications will continue in Q2 2017, with measurement of the metric planned to start in Q3 2017. The first anticipated semi-annual report that will include reporting on the new metric is April 2018, after one full measurement cycle is completed.