Hamilton Public Library

Special Hamilton Public Library Board Discussion – Strategic Plan
Central Library Board Room – July 26, 2017. 5-8 pm

Facilitator: Dr. Brian Detlor
Attachment: Background Information – Context for Strategic Planning Discussions

Agenda
1. Introductions
2. Meeting objectives
3. Exercise #1 – "Identifying Essential Themes" from the Background Readings not currently included in the Strategic Plan
4. Exercise #2 - "Placing Essential Themes" in the Strategic Plan
   BREAK
5. Exercise #3 – "Planning Community Consultation"
6. Review meeting outcomes & next steps

BACKGROUND INFORMATION – CONTEXT FOR STRATEGIC PLANNING DISCUSSIONS
Paul Takala, Chief Librarian/CEO, Hamilton Public Library   July 2017

This document has been developed as a background preparation for the strategic planning discussions. In each case the most highly relevant sections of longer documents have been extracted. Links are provided to the full text for those that wish to explore more deeply.

1. **Hamilton Public Library Current Strategic Priorities** – Board adopted priorities from 2012-2016. http://www.hpl.ca/articles/strategic-priorities-2012-2016

2. **Meeting User Needs IV** – This document identifies five key assumptions about challenges and opportunities HPL will likely face over the next decade.

3. **City of Hamilton Strategic Plan** – Council's adopted priorities from 2016 to 2025. https://www.hamilton.ca/city-initiatives/priority-projects/2016-2025-strategic-plan

4. **Our Future Hamilton Community Vision** – Long term vision for Hamilton. Extensive consultations identified community aspirations. https://www.hamilton.ca/city-initiatives/priority-projects/our-future-hamilton

5. **The Future Now: Canada's Libraries, Archives and Public Memory** – This November 2014 report by the Royal Society of Canada Expert Panel Report made recommendations to the library and archival communities. http://rsc-src.ca/sites/default/files/pdf/L%26A_Report_EN_FINAL_Web.pdf

6. **Rising to the Challenge: Re-Envisioning Public Libraries** – This report from the Aspen Institute outlines a vision for public libraries focused around these assets people, place and platform. http://csreports.aspeninstitute.org/documents/Aspen-LibrariesReport-2017-FINAL.pdf

7. **Market Probe Survey of Ontarians** – 2015 survey of Ontarians commissioned by the Federation of Ontario Public Libraries. http://fopl.ca/news/fopls-ola-super-conference-presentation-on-the-market-probe-public-opinion-poll/

8. **Libraries 2016** – Pew Research Centre report on current trends in publics libraries. http://assets.pewresearch.org/wp-content/uploads/sites/14/2016/09/PI_2016.09.09_Libraries-2016_FINAL.pdf

9. **Danger Ahead: The Coming Collapse of Canada's Municipal Infrastructure –** This 2007 report for the Federation of Canadian Municipalities outlines the scope of the municipal infrastructure deficit in Canada.   Hamilton City Council is working to address

this but it is a major challenge facing municipalities.
http://www.fcm.ca/Documents/reports/Danger_Ahead_The_coming_collapse_of_Canadas_municipal_infrastructure_EN.pdf

10. **Ontario Culture Strategy: Telling our stories, growing our economy** – The Ministry of Tourism, Culture and Sport strategy released Ontario's Culture Strategy in 2016.
https://www.ontario.ca/page/ontario-culture-strategy-telling-our-stories-growing-our-economy

11. **Toronto Public Library Strategic Plan** – TPL's strategic plan for the period 2016-2019.
http://www.torontopubliclibrary.ca/content/about-the-library/strategic-plan/pdfs/strat-plan-2016-2019.pdf

12. **Vital Signs** – The Hamilton Community Foundation periodically issues a report on the quality of life in Hamilton. The last report was issued in 2015.
http://hamiltoncommunityfoundation.ca/vital-signs/

13. **The Technical Potential for Automation in the US** – This chart shows potential for work to be replaced by automation by sector.
http://www.mckinsey.com/business-functions/digital-mckinsey/our-insights/where-machines-could-replace-humans-and-where-they-cant-yet

14. **The Collaboration Continuum** – The Tamarack Institute has done work around collaboration and the need for organizations to work together to affect change.
http://www.collaborationforimpact.com/collaborative-approaches/ca-subpage-2/

HAMILTON PUBLIC LIBRARY STRATEGIC PRIORITIES

May 2012, Hamilton Public Library Board

The 2011 – 2014 Hamilton Public Library Board has adopted three strategic priorities.

We expect that meeting these new priorities will result in the shifting and reallocation of current resources, ensuring that the communities we serve will continue to enjoy a library system that is relevant, engaged and responsive.

Library staff will develop specific objectives to help the library system to reach toward our strategic priorities. Senior management will use these objectives as guidelines but may also adjust specific objectives if better opportunities to meet the Board's priorities should arise.

In many ways, the library system is already moving toward the stated strategic priorities. Some priorities might be reached by ensuring that the residents of Hamilton better understand services that are already available to them.

The Hamilton Public Library system is internationally recognized as an innovative leader in adopting new technologies, as well as seeking out new services and partnerships that help us better serve all our communities – physical, virtual, ethnic, cultural, and more. Through these priorities we will continue to be forward-looking, responsive, and accountable.

A Community Beacon

The Hamilton Public Library will be a source of pride in the community. The library's buildings and virtual spaces will be flexible and appealing and will create customer experiences that are successful and enticing. The library system will act as a unifying force within the city and within its communities.

Relevant and Responsive

The Hamilton Public Library will anticipate the needs of customers and potential customers. The library will maintain strong physical collections while growing collections and services that reflect the increasing demand for information, books, music and videos in digital formats. The library system will be a national leader, working to create model agreements with publishers and vendors that ensure all Canadians can continue to receive use of the world's intellectual property, regardless of format.

A Creative and Changing Organization

The library will strive to have staff engaged in their roles and in the library profession and ensure that staff have opportunities and support to enhance their current skills and to develop new competencies that are relevant to customers. The Library system will continuously seek new ways staff can add value to the experiences of customers and to the communities we serve.

Assumption #1: With future disruptive changes ahead, libraries will need to continue to focus on enhancing our ability to adapt. The health of our organization will be dependent upon us remaining relevant and vital to the lives of residents and to communities we serve.

In the last decade we have seen significant changes in technology that have impacted how we deliver content and services. Looking ahead to the next 10 years changes in technology and society will continue to accelerate and create disruptions. Some of those disruptions can be predicted. For example, we know that advances in technology will lead to more work being performed by machines and demographically the number of seniors in our community will continue to grow. In addition to predictable changes, there will be other rapid and significant disruptions (some positive, some negative) that we cannot identify today. In this landscape the focus should not be on trying to predict all the major trends, but rather to focus on ensuring the public library is an adaptive and resilient organization. The single best preparation we can make for this future is to continue to practice and enhance our ability to be responsive and adaptive.

Customer expectations on how our services should be provided and what those services should be will largely be shaped by their experiences outside of the library. We will continually need to ensure our services are provided in ways that meet their needs and expectations or we will lose them as customers. Investing in staff development will be key. We will need to hire new staff and support existing staff to become lifelong learners who embrace supporting customers changing needs. Flexible facility spaces will continue to be essential. As customer demands change, our facilities will need to change along with them, offering not only flexibility in space usage and layout but also with respect to service hours. To be successful we will need to embrace ongoing evaluation and continual adjustments to our work. Our primary emphasis will need to be on making persistent incremental changes, however, when circumstances dictate we will need to be ready to embrace big challenges and opportunities.

Assumption#2: There will be significant competition for funding. Operating budgets will continue to be constrained and accessing sufficient capital funding to maintain all our facilities will be an ongoing challenge.

All levels of government will continue to face significant budget pressures. That is especially true for municipal governments which are the primary funder for public libraries in most of Canada. To continue to be successful at attracting funding we will need to be effective on several fronts. Demonstrating transparency and excellence in financial management will be necessary but insufficient. We will also need to clearly demonstrate how the public library advances government priorities. New and emerging needs will need to be met without increasing our overall staffing and funding levels. To accomplish that we will need to

continually internally adjust our resources and utilize innovation to shift to work of higher value. We will need to compliment our core municipal funding with other sources of revenue.

Current building code standards and the high cost of construction for public buildings will mean most projects will require significant resources. To help defray these costs we will continue to see more emphasis on the development of multi-use facilities. Although HPL has made significant progress towards getting to a more sustainable facility footprint, maintaining all locations to the proper standard will be a challenge. We will need to leverage other investments to attract limited capital dollars. Future capital maintenance costs of existing facilities will need to be carefully considered before pursuing new library locations. As well, investing in regular repairs and lower cost renovations/updates that maintain and enhance existing facilities will need to be an important part of strategy.

Assumption #3: Public libraries are uniquely positioned to contribute to the health, education and prosperity of the communities we serve. To accomplish this we must continue to develop successful partnerships and actively participate in broader community initiatives.

With changes in technology and the economy over the last 25 years, public libraries have become more vital to many. Our spaces are increasingly important as community places that provide free access to technology, support lifelong learning and reduce social isolation. Public libraries play a supporting role in advancing the education, culture and health of the communities we serve. We need to recognize that we contribute to good outcomes but we do not work in isolation. Moving forward we will need to continue to advance our maturity at partnering in ways that enable us to support our mission more sustainably while we advance key community initiatives. We have seen that increasingly governments are funding initiatives that can demonstrate meaningful collaboration. Collaborations are necessary when trying to address complex issues and they can play an important role at reducing the duplication of effort between different agencies. As we continue to evolve our program and service offerings to meet new needs we must work with governments, educational institutions and other organizations that align with our mission.

Assumption #4: The trends toward the increasing importance of digital content and growing competition from the private sector to provide access to it will continue. The circulation of physical books will remain a core service and unique local content held and made accessible by HPL will become increasingly important.

The proliferation of tablets and quality eReaders around 2010 led to a rapid adoption of eBooks. That shift was seen in public libraries and the broader book industry.   After seeing several years of what appeared to be exponential growth in digital usage we are now seeing modest growth overall. Our current eBook circulation is constrained by the cost and terms with which publishers make eBooks available to public libraries. Some progress has been made with publishers over the last few years but more work needs to be done. HPL will need to continue to be engaged nationally on this issue with other libraries.   Looking at the shift from physical to digital formats, we should anticipate the physical book will be a more

enduring popular format than DVDs and other physical media that provide access to music or video. Looking forward we will need to carefully and continually monitor trends to ensure we are purchasing materials in the formats that people want. We will also need to ensure we understand the local picture and anticipate different trends may happen in different parts of the City.

Services such as Amazon, Netflix, iTunes and Audible demonstrate that the private sector can successfully provide access to large libraries of digital content at relatively low cost. We will need to continue to monitor usage patterns and market developments to ensure the public library continues to provide free access to a broad range of content for a large and diverse group of residents. One likely outcome of this development will be that some residents, especially those with financial resources, may not need the public library for many of their digital content needs. In this case other library services may become important for those individuals, such as, our spaces, technology access, storytimes, learning programs and cultural events. In this environment we will need to continually assess the amount of space our collections take-up and ensure we have the right balance in how our spaces are configured.

In this changing content landscape, the importance of local content should not be underestimated. The role our Local History & Archives Department plays in preserving local history and telling local stories resonates strongly with residents. Our relevance is enhanced by expanding access to this material through digitization and by the Library supporting the creation of new digital content. As we foster the ability for people to move from content consumers to content creators we nurture the skills needed to succeed in the workplace, we help people find their own unique voice and build a stronger more inclusive community.

Assumption #5: **Network security, privacy and intellectual property issues will become more challenging. With content we control we have an opportunity to model best practices that facilitate effective sharing that creates the maximum benefit to society.**

With the increasing sophistication and proliferation of hacking, public libraries will need to be diligent to ensure privacy is protected and the integrity of our information systems is preserved. We should anticipate we will need to dedicate more resources and attention to keeping our systems secure as new threats emerge.

Libraries facilitate access to copyrighted material. As new technologies emerge that make it easier to share, modify and edit content, the content publishers will continue to face challenges to their business models and will push for legal protections including restrictions on fair use. Libraries have a unique role to play in advocating for copyright rules that effectively balance the rights of copyright holders with the rights of users.

As HPL facilitates the creation of local content we need to ensure the licenses they are made available under are as open as possible given the circumstances. To facilitate access to some material where we do not own the copyright we will need to develop agreements that are mutually beneficial. We should continue to use and embrace standards such as the Creative Commons licenses.

CITY OF HAMILTON
STRATEGIC PLAN
2016-2025

OUR VISION

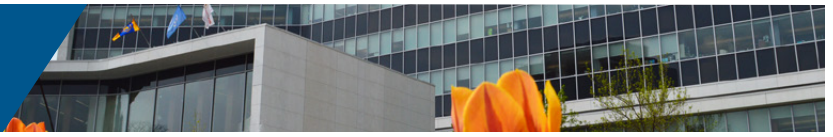To be the best place to raise a child and age successfully.

OUR MISSION

To provide high quality cost conscious public services that contribute to a healthy, safe and prosperous community, in a sustainable manner.

OUR CULTURE

Collective Ownership	Steadfast Integrity	Courageous Change	Sensational Service	Engaged Empowered Employees

OUR PRIORITIES

COMMUNITY ENGAGEMENT & PARTICIPATION
Hamilton has an open, transparent and accessible approach to City government that engages with and empower all citizens to be involved in their community.

ECONOMIC PROSPERITY & GROWTH
Hamilton has a prosperous and diverse local economy where people have opportunities to grow and develop.

HEALTHY & SAFE COMMUNITIES
Hamilton is a safe and supportive city where people are active, healthy, and have a high quality of life.

CLEAN & GREEN
Hamilton is environmentally sustainable with a healthy balance of natural and urban spaces.

BUILT ENVIRONMENT & INFRASTRUCTURE
Hamilton is supported by state of the art infrastructure, transportation options, buildings and public spaces that create a dynamic City.

CULTURE & DIVERSITY
Hamilton is a thriving, vibrant place for arts, culture, and heritage where diversity and inclusivity are embraced and celebrated.

OUR PEOPLE & PERFORMANCE
Hamiltonians have a high level of trust and confidence in their City government.

www.hamilton.ca

Our Future Hamilton

"Communities in Conversation"

COMMUNITY ENGAGEMENT REPORT

INTRODUCTION
Background

In 1992, the City of Hamilton asked residents what Hamilton would look like in 25 years. The result of this exercise was Vision 2020 – Hamilton's first community vision. Vision 2020 was the catalyst for collaboration and change within the city and is comprised of 28 goals in 14 theme areas. These goals have helped to guide the City of Hamilton in its decision-making and strategic planning processes. Vision 2020 also helped the community make significant progress in the areas of arts and heritage, reducing and managing waste, improving air quality, improving water quality and protecting natural areas. It inspired collaboration in environmental protection, poverty alleviation, cultural and economic growth and leading edge planning in the integration of infrastructure and growth.

In the City of Hamilton's 2012-2015 Strategic Plan, the City's corporate vision is *"to be the best place in Canada to raise a child, promote innovation, engage citizens, and provide diverse economic opportunities"*. This vision, informed by Vision 2020, guides the organization's strategic priorities and demonstrates that full engagement of Hamilton's residents, businesses, institutions and other regional stakeholders in ongoing, meaningful dialogue is necessary to the success of any project within the city.

With the year 2020 only a few years away, and the development of a new strategic plan for Hamilton planned for early 2016, the City of Hamilton is again asking the community what Hamilton should look like in 25 years. *Our Future Hamilton: Communities in Conversation* is an engagement initiative aimed at gathering input from everyone who lives, works, plays and learns in the community about their vision for the future of Hamilton. The project started in April 2015 and concludes in early spring 2016.

The ideas and comments that are synthesized in this report come from a variety of engagement activities undertaken as part of Phase One of *Our Future Hamilton: Communities in Conversation*. The conversations that took place captured the pride Hamiltonians have for their city and their commitment to supporting Hamilton's continued momentum.

"WHAT WE HEARD"

This section presents a summary of the feedback received through all engagement mechanisms, including the online survey, "Tell us your vision" cards, community visioning workshops, Environmental Summit, community presentations and community-led conversations. The summary of participant feedback provides a high-level synopsis of the community's vision for Hamilton. Feedback is organized according to the following seven key draft directions.

Summary of Draft Directions and Emerging Community Priorities.

1 Advance environmental responsibility and stewardship

i. Reduce our contribution to climate change

ii. Strive to be a zero waste community

iii. Protect and improve our water and air quality

iv. Preserve and rehabilitate the city's natural ecosystems

v. Transition to more sustainable practices

2 Maintain community assets and critical infrastructure

i. Build complete streets that are safe for all users

ii. Increase the availability of affordable housing and reduce homelessness

iii. Build resilient and accessible infrastructure

iv. Preserve Hamilton's natural and built heritage

v. Create a vibrant waterfront and inviting downtown

3 Increase economic prosperity and opportunities

i. Reduce poverty

ii. Diversify the economy to reduce single-industry reliance

iii. Support local businesses and innovation

iv. Foster partnerships between industry and the education system

4 Foster an active and healthy society

i. Build safe environments to support active modes of transportation

ii. Provide outdoor and indoor recreation opportunities in all communities

iii. Promote local farming and healthy nutrition

iv. Expand access to health care, particularly mental health services

v. Provide accessible neighbourhood greenspaces

5 Promote connected communities and safe neighbourhoods

i. Be a city that is safe for all ages and abilities

ii. Build a connected and reliable transportation network that is less dependent on automobiles

iii. Revitalize unsafe neighbourhoods

Hamilton
Public
Library

Excerpts from the
The Royal Society of Canada Expert Panel Report

The Future Now

CANADA'S LIBRARIES, ARCHIVES, AND PUBLIC MEMORY

November 2014

The full report is available online the RSC website:
http://rsc-src.ca/sites/default/files/pdf/L%26A_Report_EN_FINAL_Web.pdf

A note to the reader: This document includes excepts of the report that have been selected to provide an overview of the RSC report from a public library perspective and is not intended to be a replacement for reading the full report.   A lot of careful thought, consultation, and research went into the development of the RSC Panel's report. This document includes some formatting changes. If at times this document does not flow effectively it is a result pulling only selected passages.

Paul Takala, Chief Librarian/CEO, Hamilton Public Library, January 2015

Executive Summary

Purpose

Spring 2013 the Royal Society of Canada (RSC) struck this Expert Panel on the status and future of Canada's libraries and archive institutions. Our mandate acknowledged the allied obligation of libraries and archives. "They collect, preserve, and disseminate knowledge, and provide access to information and intellectual resources for civic engagement."

Recognizing that these institutions are "actively meeting the challenges of unfolding digital technologies, changing cultural practices, and society's expectations," RSC charged the Panel:

- To investigate what services Canadians, including Aboriginal Canadians and new Canadians, are receiving from libraries and archives;
- To explore what Canadian society expects of libraries and archives in the 21st century;
- To identify the necessary changes in resources, structures, and competencies to ensure libraries and archives serve the public good in the 21st century;
- To listen to and consult the multiple voices that contribute to community building and memory building;
- To demonstrate how deeply the knowledge universe has been and will continue to be revolutionized by digital technology; and
- To conceptualize the integration of the physical and the digital in library and archive spaces.

Values

Archivists and librarians are dedicated to initiating, preserving, managing, and sharing the records of our human, economic, and symbolic capital.

The complexity of this system is not well known, either to funding authorities or to Canadians in general. Canadians' stories address the need for equitable and diverse access and extended outreach, the conditions for student success, the accommodation of different media and venues for career progress, the experience of frustration, and the countervailing realities of civic welcome and the sustaining presence of community

Whether archivists and librarians see value as an overarching principle of worth, significance, or usefulness rooted in realities or as an enduring belief that motivates conduct, they unite in affirming that "the end-state that value wishes to achieve is that the people of the future will be able to know what we know" (Gorman 7). As charters, universal declarations, manifestos of core values, and shared values wheels demonstrate, archivists and librarians are dedicated to initiating, preserving, managing, and sharing the records of our human, economic, and symbolic capital.

Archives constitute a fundamental element of our heritage, a privileged, irreplaceable witness, which archivists evaluate and maintain as our collective memory. Archivists have to be involved at the first instance of creation of the record to ensure its survival throughout the continuum. Creating and maintaining records are not discretionary or merely desirable; they are a legal requirement for all public bodies and for most private organizations and individuals. Although the differences between libraries (where books and other types of published materials with pre-organized information are discrete entities) and archives (where unique material is preserved in the context of its creation and where access may be mediated) are marked, and variations in descriptive standards and metadata practices further demarcate the two institutions, they nonetheless share certain principles: diversity, access to physical and virtual services and spaces, and a vigorous commitment to engaging and informing all citizens.

Archivists and librarians are dedicated to initiating, preserving, managing, and sharing the records of our human, economic, and symbolic capital.

Collective Civic Responsibility

Libraries and archives strengthen the connective tissues of our society by reminding us of what has made us Canadians.

The duty to collect, preserve and catalogue the printed and digital materials of our national heritage is a vital responsibility. Historian Charlotte Gray has observed:

> In our literate and sophisticated country that has changed so dramatically over time, we are in constant danger of losing sight of the people, ideas and values that have shaped our society. Such a loss would mean we would become a country with amnesia – if not Alzheimer's. Libraries and archives strengthen the connective tissues of our society by reminding us of what has made us Canadians.

Recent issues around email systems in the Office of the Ontario Premier and the Prime Minister's Office have highlighted the growing need for effective rules and enforcement of compliance for both the creation and the proper maintenance of records. The report of the British Columbia Privacy Commissioner, released in July 2014 sounds an alarm about the failure to archive ten years of valuable government records and strongly recommends modern records management legislation.

....energetic attention to the citizen-user marks a tectonic shift in libraries and particularly in community archives. Ernie Ingles reminds us of the vast social scope of the influence of libraries visible on a daily, even hourly, basis in these snapshots:

> A mother reading to her child for the first time after having attended a public library's literacy program; a child simply learning the wonder of words in a story time session; a teenager unraveling the mysteries of adulthood in the YA reading programs; the college or university student realizing that she will not graduate without the library; professionals seeking to update their skills and credentials; a young couple improving their lives together; a new Canadian in search of language skills; and a senior whose outstretched leathery hand simply says 'thank you' for a lifetime of enlightenment and enjoyment.

Public Libraries

The widespread Canadian Public Library movement was born as a social response to the disruptive technologies of the Industrial Revolution. Mechanics' Institutes formed many of the early Canadian public libraries, allowing their members to share reading material and to learn new skills. As literacy increased, so did the demand for recreational reading material. Children's libraries were added with the birth of a robust children's publishing industry.

There were public library systems in some Canadian cities and towns by the early years of the twentieth century, but many were subscription libraries open only to those who could pay. Andrew Carnegie's gift to cities across the United States and the British Empire changed this dynamic. Carnegie insisted that any community receiving a gift from his foundation had to demonstrate support for a public library; provide a site; commit tax support; and ensure that the library would be free for all to use. These principles still resonate with Canadians.

Canadian public libraries have endured many radical changes over the past hundred years, and they have emerged stronger each time. During the Depression, they became the "people's university," a

term coined by American adult educator Alvin Johnson in 1938. They became places where people could first explore personal computers without having to purchase them in the mid-eighties. They are now becoming places more dedicated to the concept of personal discovery than to "lending" materials.

Public libraries are unique community cultural institutions. Art Galleries, museums, and theatres all present cultural material that is themed and packaged with the hope that it will appeal to people in their communities. Public libraries offer their users the freedom to choose the ideas, thoughts, or literature they wish to explore. Users also receive support in following their own paths.

Public Libraries Today

In the Carnegie library era, the priority was to acquire, store, maintain, and circulate the book collection. The physical collection determined each building's layout. Utility, economy, and the need for a quiet reading room were the drivers of library design. Mid-twentieth century library building attempted to create more flexible spaces, but designs remained book-centric. Many library buildings from this period have required substantial renovation and refurbishment to accommodate new services, technology, and digital collections.

In the latest wave of building, new iconic facilities across Canada reflect the change in public expectations, the diversity of the population, the new technologies and multiple information formats to be accessed. As Shannon Mattern comments in *The New Downtown Library*, "through the design and construction of a new home, libraries reassess or reaffirm who they are, they reconsider what is central to their institutional identity and they reflect on how to assert their continued relevance in an era in which their obituary has already been written by a myopic few." She notes that designs must now reflect and accommodate often competing values and activities, community groups and global information networks, born digital and book people, noisy and quiet activities. They must accommodate the past while anticipating the future.

Libraries have become important community hubs, cultural centers, community destinations, resources for self-directed life-long learning, and creative incubators. Beyond collections, they provide media, exhibition space, theatres, cafes, spaces for collaborative activities, maker spaces, a place for public events, spaces for teaching and tutoring, and genealogy and local history research areas.

The influence of bold new designs and concepts from Scandinavia, Northern Europe, and Asia is reflected in recent Central Library design. The Library of the Future "is not a temple for storage of books, but a public place of sharing and experiencing, it is a social platform for learning and meeting, offering myriads of ways to access knowledge, an open space between home and work" (Schmidt hammer lassen architects, 2013). Libraries have proven themselves to be resilient and capable of transforming themselves to meet the needs of a changing society. The future cannot be entirely foreseen but for consultant Susan Kent, "the future library should be an institution on the edge, experimenting with the new, leading the user on the way into the possibilities and potential of technology and collaboration," and for Rolf Hapel, the Director of Citizen Services and Libraries for the City of Aarhus, "the future library building must support many formats and platforms for human meeting, interaction and exchange, for thinking and contemplation, for learning and experience, for reading, dialogue and creation."

Panel Recommendations on Public Libraries

The centrality of the public library to civic life in Canada is indisputable. However, inequities in available services between urban and rural public libraries must be addressed. Print and technologically-driven services need to be both mandatory and consistent. To resolve issues of inconsistent service, rural bandwidth, and InterLibrary loan, we identify lead roles in public library boards, provincial and territorial library associations and ministries, and Industry Canada. We also insist on the benefits of consortia to ensure and maintain services. To provide Canadians with access to the content they need, CULC and CARL, in conjunction with BiblioPresto and international library associations, should work closely with publishers and vendors to ensure unified and rich collections.

- Public libraries make their work visible by posting evidence-based studies and economic impact studies on library websites for the benefit of the entire library community.
- Public libraries continue to share statistical data freely with CULC and other similar organizations.
- Library associations and organizations undertake and publish research into common issues facing the public library community.
- Faculties of library and information science include a course in community development to better prepare graduates to fulfill changing roles in public libraries and meet the needs of a diverse community.
- Public libraries regularly inventory their programs, services, policies, and physical spaces to detect and remove barriers.
- Public libraries engage in meaningful community consultations to ensure the relevance and inclusiveness of their institutions.
- Public libraries pursue and strengthen their collaborations with literacy councils to expand and improve their English Language Learning programs and services.
- Provincial and territorial governments recognize, through legislation, the need for urban and rural libraries to provide digital services.
- The federal government, namely Industry Canada, adopt the need for better rural bandwidth as a higher national priority. We make this recommendation fully recognizing that the federal government has increased its spending on rural broadband initiatives but aware, as well, that these initiatives are not part of a formal, national strategy. There is no commitment to meet specific standards in rural areas. Realistic timelines for the delivery of acceptable bandwidth into all Canadian communities are needed.
- LAC re-establish its role as mediator working on behalf of print disabled Canadians, and in the first instance bring all competing service providers together, including non-aligned representation from the print disabled community itself, for the purpose of seeking a single, sustainable, and effective service model that is welcomed by the print disabled as the best in service of their interests. It is recommended that in the absence of a mediated settlement, LAC will seek to craft a governmental/political solution to achieve a similar purpose.
- Provincial and territorial governments work with the federal government to ensure that Aboriginal Canadians receive fair and equitable access to public library services.
- Where necessary, ministries of provincial and territorial governments with a responsibility for the delivery of public library services support Canadian public library systems in forming larger units of service in order to provide adequate technologically-driven services, to mandate the provision of these services, and to promote the purchase of ebook material through consortia.

- Each province and territory review its InterLibrary loan policies in order to ensure that these policies mesh across sectors and place an emphasis on the research needs of Canadians and not on everyday library reading needs. Other mechanisms, such as ebook cooperatives, should be developed to meet everyday needs of users. Responsibility lies with the various provincial and territorial library associations plus CLA, working in alliance with LAC as a partner. Provincial and territorial government ministries should be involved, since changes may involve regulations and policies. Since college, university, school and public libraries often report to multiple ministries, it is impractical for government to act as the lead.
- Libraries and publishers work more closely together with an understanding that they are part of the same ecosystem and need each other to be successful and to provide Canadians with access to the content they need. Since public libraries deal more with trade publishers, responsibility lies with the *Canadian Urban Libraries Council*. CULC libraries produce almost 90% of all Canadian public library circulation and CULC is designed to act quickly and to help libraries as organizations. Since academic libraries deal more with academic publishing, responsibility lies with the *Canadian Association of Research Libraries*. For products used by all sectors, such as electronic databases, CULC and CARL should work together.
- CULC and CARL, in conjunction with BiblioPresto and international library associations, support libraries and vendors to work in closer collaboration, allowing libraries to obtain content that can be merged into unified collections emphasizing the nature of the content itself and not the name of the vendor who provides that content.

Copyright and Canadian Libraries and Archives in the Digital Environment

Awareness of and compliance with copyright legislation is a vital issue for librarians and archivists. The law provides for considerable fair dealing and flexibility, which should be utilized. However, inequitable access to electronic resources requires more institutional cooperation on licensing and hosting. As purchasers or licensees of copyrighted works, libraries provide considerable support for authors and their publishers. Consequently, in all discussions of copyright, the interests of library and archive patrons must be balanced against the rights of creators of literary and artistic works to be appropriately recognized and compensated.

Summary of Recommendations:
- Libraries and archives make full use of their users' rights of fair dealing and the additional specific exceptions and limitations to copyright to engage in productive initiatives such as digitization of collections in analogue media, providing private study copies to patrons, and otherwise using the flexibility provided by the law as appropriate.
- Libraries and archives continue to participate in proceedings before the Copyright Board to ensure that their positions are well represented.
- Library licensing practices for electronic resources be revised. From a user's perspective, the Internet enables equal access to digital information wherever there is a connection. But, access to licensed electronic resources, including ebooks, varies greatly across Canada because licensing is still done at the local, or sometimes at the consortial, level. Greater institutional cooperation on licensing and hosting should be given high priority to equalize access to the resources by using cloud services or other shared Internet infrastructure.

- In discussions of how to adapt to the digital environment, concerns about increasing access are balanced with concerns about ensuring that creators of literary and artistic works are adequately compensated for their contribution to Canada's cultural legacy.

RISING TO THE CHALLENGE
Re-Envisioning Public Libraries

A report of the Aspen Institute Dialogue on Public Libraries

by

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FOREWORD

The time has come for a new vision of public libraries in the United States. Communities need public libraries—more people are visiting them and using their services, materials and programs than ever before—but communities' needs continue to change.

While the public library was conceived in an age of information scarcity, today's networked world is one of information abundance and mobility. The spread of powerful digital information and communication technologies has touched every aspect of daily life, creating new opportunities. The Internet has become the critical gateway for accessing information, job opportunities, education, financial and government services, healthcare resources and civic participation. Moreover, these technologies present new opportunities for local and regional entrepreneurs and communities to compete, including at national and international levels—economies of small thriving alongside economies of scale.

But this new world of "information plenty" creates new, essential skills, such as the ability to gain value from information and produce new knowledge. Access to digital networks and digital literacy skills are essential for full participation in modern society. Economic, educational, civic and social opportunities are tied to a whole new set of knowledge and skills that barely existed a generation ago, and people without these skills or access to this information abundance are quickly left behind.

Public libraries can be at the center of these changes: a trusted community resource and an essential platform for learning, creativity and innovation in the community. Public libraries have the DNA needed to thrive in this new information-rich, knowledge-based society.

Providing access and connecting knowledge to the needs of individuals and the community have always been at the center of the mission and purpose of libraries.

In fact, public libraries are already at the forefront of tackling social inequalities by providing access to online information and supporting digital literacy. They provide supportive, creative learning spaces for young people after school. As a key strand in the social safety net, public libraries provide an important lifeline to jobs, educational opportunities, literacy, health resources and government and community services, especially for immigrants and disadvantaged populations. Public libraries are highly trusted institutions rooted in the neighborhoods that they serve. Yet some critics question their continuing relevance in an age when information can flow via digital devices to virtually anyone, anywhere, at any time.

Enabling all public libraries to fulfill their new roles will require community leaders, civic partners and librarians to share a new vision for what libraries can be. To meet the needs of individuals, the community and the nation in the knowledge society, public libraries must be re-invented for a networked world, in which the value of networks grows as more connections are made. Innovations built on the old distributed model of the lending library will not suffice. What is needed is a new level of interdependence that communities and libraries must embrace together.

EXECUTIVE SUMMARY

Expanding access to education, learning opportunities and social connections for all is one of the great challenges of our time. It is a challenge made more urgent by the rapid transition from old industrial and service-based economic models to a new economy in which knowledge and creativity are the drivers of productivity and economic growth, and information, technology and learning are central to economic performance and prosperity.

It is not only the economy but all of society that is being reshaped by these trends. Amid these changes, there are divides in wealth, digital inclusion and participation that threaten to widen if we as a nation do not commit to new thinking and aggressive action to provide these opportunities for all.

This is a time of great opportunity for communities, institutions and individuals who are willing to champion new thinking and nurture new relationships. It is a time of particular opportunity for public libraries with their unique stature as trusted community hubs and repositories of knowledge and information.

THE PUBLIC LIBRARY IN THE DIGITAL AGE

Libraries are essential to success and progress in the digital age.

The process of re-envisioning public libraries to maximize their impact reflects:

o Principles that have always been at the center of the public library's mission—equity, access, opportunity, openness and participation

o The library's capacity to drive opportunity and success in today's knowledge-based society

o An emerging model of networked libraries that promotes economies of scale and broadens the library's resource reach while preserving its local presence

o The library's fundamental people, place and platform assets

The Dialogue's perspective on the 21st-century library builds on the public library's proven track record in strengthening communities and calls for libraries to be centers of learning, creativity and innovation in the digital age. No longer a nice-to-have amenity, the public library is a key partner in sustaining the educational, economic and civic health of the community during a time of dramatic change. Public libraries inspire learning and empower people of all ages. They promote a better trained and educated workforce. They ensure equitable access and provide important civic space for advancing democracy and the common good. Public libraries are engines of development within their communities.

PUBLIC LIBRARIES AT THE CENTER OF THE DIGITAL AGE

Public libraries are poised to play a leading role in helping individuals and communities adapt to this changing world. Many libraries already are linking individuals to information and learning opportunities, driving development and innovation, and serving as community connectors. With nearly 9,000 public library systems and 17,000 library branches and outlets across the country, there is already a significant physical presence and infrastructure to leverage for long-term success.

Enabling all libraries to fulfill their new roles will require library leaders, policy makers and community stakeholders to re-envision the public library and take advantage of the opportunities it offers.

PEOPLE, PLACE AND PLATFORM

The emerging value proposition of the public library is built around three key assets—people, place and platform:

o **PEOPLE.** The public library is a hub of civic engagement, fostering new relationships and strengthening the human capital of the community. Librarians are actively engaged in the community. They connect individuals to a vast array of local and national resources and serve as neutral conveners to foster civic health. They facilitate learning and creation for children and adults alike.

o **PLACE.** The public library is a welcoming space for a wide range of purposes—reading, communicating, learning, playing, meeting and getting business done. Its design recognizes that people are not merely consumers of content but creators and citizens as well. Its physical presence provides an anchor for economic development and neighborhood revitalization, and helps to strengthen social bonds and community identity. The library is also a virtual space where individuals can gain access to information, resources and all the rich experiences the library offers. In the creative design of its physical and virtual spaces the public library defines what makes a great public space.

o **PLATFORM.** The public library is user-centered. It provides opportunities for individuals and the community to gain access to a variety of tools and resources with which to discover and create new knowledge. The platform enables the curation and sharing of the community's knowledge and innovation. A great library platform is a "third place" —an interactive entity that can facilitate many people operating individually and in groups—and supports the learning and civic needs of the community.

STRATEGIES FOR SUCCESS

The Dialogue concludes that the long-term health of libraries is essential to the long-term health of the communities they serve and identified four strategic opportunities for action to guide the continuing transformation.

1. ALIGNING LIBRARY SERVICES IN SUPPORT OF COMMUNITY GOALS

Public libraries that align their people, place and platform assets and create services that prioritize and support local community goals will find the greatest opportunities for success in the years ahead. Managers of local governments report that it is often difficult to prioritize libraries over other community services such as museums or parks and recreation departments that also serve a distinctly public mission. What libraries need is to be more intentional in the ways that they deploy resources in the community, and more deeply embedded in addressing the critical challenges facing the community. This will require a level of flexibility and adaptability to change as community needs change. It will also require collaboration among libraries, policy makers and community partners to redefine the role of libraries as institutions that inspire learning, drive development, grow social capital and create opportunities.

2. PROVIDING ACCESS TO CONTENT IN ALL FORMATS

As the public library shifts from a repository for materials to a platform for learning and participation, its ability to provide access to vast amounts of content in all formats is vital. Libraries face two immediate major challenges in providing access to content in all forms:

o Being able to procure and share e-books and other digital content on the same basis as physical versions

o Having affordable, universal broadband technologies that deliver and help create content

Dealing with both challenges have been high priorities for public libraries throughout the country. The challenges have been particularly acute for small libraries, those in rural communities and in some urban areas where limited budgets make access to e-books and upgrades to high-speed broadband difficult despite high community need for and interest in both. Ensuring access to e-books, other e-content and more-than-adequate high-speed broadband is a big concern going forward because it impacts the public library's ability to fulfill one of its core missions—to procure and share the leading ideas of the day and enable everyone to participate in the world's conversations.

3. ENSURING THE LONG-TERM SUSTAINABILITY OF PUBLIC LIBRARIES

Perhaps the greatest challenge facing public libraries today is to transform their service model to meet the demands of the knowledge society while securing a sustainable funding base for the future. With limited and sometimes volatile funding, however, such transformations will be uneven and incomplete. In addition, the highly local nature of public library funding and governance structures may interfere with both rapid and broad-scale progress—the kind of scale needed to compete and thrive in a world of global networks. Challenges that shape the discussion about long-term public library sustainability given their vital role in the digital era include:

o Identifying reliable sources of revenue for daily operations as well as long-term planning and investment

o Exploring alternative governance structures and business models that maximize efficient and sustainable library operations and customer service

o Becoming more skilled at measuring outcomes rather than counting activities

o Balancing the local and national library value proposition to consider economies of scale in a networked world without compromising local control

4. CULTIVATING LEADERSHIP

Leadership is needed across the community—from elected officials, government leaders, business and civic leaders and libraries themselves—to build communities and public libraries that thrive and succeed together. Vision is a critical component of leadership. Every community needs a vision and a strategic plan for how to work with the public library to directly align the library and its work with the community's educational, economic and other key goals. It must have input from all stakeholder groups in the community. Key steps in building community leadership to support the public library include improving communications with community leaders, developing community champions, strengthening intersections with diverse communities and communities of color, reaching out to and engaging with young-professional organizations and demonstrating the collective impact of partners working together.

A NEW WORLD

WORLD

OF KNOWLEDGE

Expanding access to education, learning opportunities and social connection for all is one of the great challenges of our time. It is a challenge made more urgent by the rapid transition from old industrial and service-based economic models to a new economy in which knowledge and creativity are the drivers of productivity and economic growth, and information, technology and learning are central to economic performance and prosperity. It is not only the economy but all of society that is being reshaped by these trends. Amid these changes, there are troubling divides in wealth, digital inclusion and participation that threaten to widen if we as a nation do not commit to new thinking and aggressive action to provide these opportunities for all.

The digital era has produced remarkable changes in everyday life—for the individual as well as for the community.

o Social media connect people across town and around the world, enabling new kinds of communities that transcend geographic barriers.

o Mobile technologies provide always-on connectivity to people and information, and they enable us to enjoy more highly personalized and immediate experiences with information, media, education and commerce.

o Advances in sensors and related technology are making individuals healthier and our communities even "smarter" while at the same time creating mountains of data to be filtered, analyzed and turned into new knowledge.

o Informed, engaged citizens demand a stronger voice and greater participation in shaping their communities and increased government transparency and accountability.

o Entire industries are upended by the sometimes disrupting impact of digital technologies; new markets, new businesses, and new relationships arise from the global to the hyperlocal levels, in some cases affording greater choice in where to live and work.

Among the transformative social changes brought on by digitization are new information and learning environments in which knowledge is no longer stable over many years and skills quickly become obsolete.

"We have experienced a huge 'Gutenberg-scale' inflection point in the last 10 years. The world has gone from connected to hyperconnected and from interconnected to interdependent."

—THOMAS FRIEDMAN

These environments are shaped by a vast explosion of easily accessible information and new definitions of community, as well as a need for new resources and skills. The changes and their impacts are dramatic:

o **TECHNOLOGY** has made it possible for individuals to have instant access in their homes or on portable devices to the equivalent of the Library of Congress's entire holdings.[1]

o **COMMUNITIES**, once defined almost exclusively by geographic boundaries, are increasingly shaped by social media, often based on mutual interests rather than physical location. Networks, rather than neighborhoods, have become the dominant form of social organization.

o **EMPLOYMENT** is increasingly transient, with the average worker staying in a job 4.4 years rather than an entire career. Among workers born between 1979 and 1999, average tenure is 2.2 years or less.[2] Keeping up with a more mobile job marketplace requires access to information and resources and skills to navigate vast amounts of information.

The knowledge economy requires individuals to acquire a range of skills and to continuously adapt those skills to changing circumstances. Author and *New York Times* columnist Thomas Friedman has written about the impact that the evolution to a digitally driven economy, with its demand for continual renewal of skills, is having on individuals and communities. Friedman calls it "a 401(k) world—a world of defined contributions, not defined benefits."[3]

"We have experienced a huge 'Gutenberg-scale' inflection point in the last 10 years. The world has gone from connected to hyperconnected and from interconnected to interdependent. This has been such a shift in degree that it has become a shift in kind," Friedman says in a 2014 interview.[4] Driving this big shift is the emergence and rapid diffusion of four major technologies—personal computing, the Internet, collaborative workflow software and search capabilities (e.g., Google)—which Friedman observes has created "a platform on which more people from more places could compete, connect and collaborate—as individuals or companies—for less money with greater efficiency and greater ease than ever before."[5]

To a significant degree, the knowledge economy gives birth to the creation economy, a free-agent economy in which opportunities for lifelong learning must be abundant and people need skills as knowledge creators, not simply information consumers.

Importantly, these learning opportunities must be present throughout the community and persistent throughout a lifetime.[6] "Now the half-life of a skill is down to about five years, and genres have a lifetime of four or five years, so most learning in the future won't go on in schools," said John Seely Brown, co-director of the Deloitte Center for the Edge, at the first meeting of the Dialogue working group. "We've shifted from stable stocks of knowledge and an archived world to a world of information flows, participation and states of confusion. Now we create as fast as we learn. The game is more complicated."

At the same time that the half-life of a skill is shrinking, information is becoming more abundant and the means of production are becoming more accessible. This opens up new channels for sharing and the distribution of knowledge. A state of information abundance places a premium on the ability to navigate, create and innovate in this new environment. The ability to exploit these means of production and knowledge sharing has become the new "literacy."[7] In this environment, success will belong to the "entrepreneurial learner," the person capable of finding resources anywhere and using them to read the world and teach themselves.[8]

The sweeping changes underway pose new and sustained challenges for communities, which are changing as well. Over the next three decades, the U.S. population is expected to grow to more than 400 million, with most of that growth coming from immigration.

By 2050, one in five Americans will be an immigrant, and 30 percent of the population is projected to be Hispanic. The United States is aging, too: By 2050, one in five Americans will be over the age of 65.[9] Concurrent with these demographic changes are fundamental shifts in the economy that change how Americans will learn and earn a living.

In its 2009 report, the Knight Commission on the Information Needs of Communities in a Democracy described the digital era as a moment of technological opportunity "unleashing innovation in the creation and distribution of information" and requiring "new thinking and aggressive action."

The Commission went on to say, "Every advance in communications technology expands the possibilities for American democracy, but every information system also creates potential winners and losers."[10]

How we seize this moment of opportunity, and the visions and actions that carry us forward into the future, will affect not only the health and prosperity of individuals and families, but the quality of the democratic communities that we nourish and sustain in the 21st century. Will they be thriving, prosperous and sustainable communities that attract new residents? Will they be places where we will want to live?

WHAT PEOPLE AND COMMUNITIES NEED TO FLOURISH IN THE KNOWLEDGE ECONOMY

LIFELONG ACCESS to an ever-increasing and ever-changing body of knowledge and tools to ensure that their skills remain relevant to the current economy as it continues to evolve

THE CAPACITY AND DISPOSITION TO LEARN IN SMALL, QUICK DOSES rather than wade through mounds of links and piles of data that provide too much information and too little knowledge

THE ABILITY TO USE, UNDERSTAND AND PROCESS INFORMATION IN MANY DIFFERENT FORMS including text, data, audio and video and to evaluate the quality of information from different sources and understand its relevance.

PLACES TO GATHER, collaborate and contribute to knowledge development

ACCESS TO CONVERSATIONS AMONG CREATIVE PEOPLE in their areas of interest so that they can innovate and develop or maintain a competitive advantage in the knowledge economy

People and communities need **PUBLIC LIBRARIES**.

Approaches to managing the opportunities and risks of this new era can differ widely from community to community, but there are approaches that are emerging as indicators of success. One of these is re-envisioning the role of the public library as a vital learning institution and engine for individual, community and civil society development.

The library, the most democratic of public institutions, is the essential civil society space where this new America will make its democratic character. The library is a core civil society institution, democracy's "maker space." In a healthy democracy, civil society is the piece that makes the rest of the democratic machinery possible and workable. Most simply, civil society consists of everything that falls under the rubric of voluntary association, from churches to neighborhood associations, softball leagues to garden clubs.

> The library, the most democratic of public institutions, is *the* essential civil society space where this new America will make its democratic character.

Civil society performs a number of critical functions: It provides a buffer between the individual and the power of the state and the market, it creates social capital, and it develops democratic values and habits.[11] Civil society is where citizens *become* citizens. By design and tradition, the public library is *the* essential civil society institution. Through the provision of space, information and inspiration, it enables all the others.

The institution of the public library is uniquely positioned to provide access, skills, context and trusted platforms for adapting in this new society.

PEOPLE, PLACE AND PLATFORM

The role of the 21st-century library in the digital era is built on its three key assets: people, place and platform.

THE LIBRARY AS PEOPLE

Take away my people, but leave my factories, and soon grass will grow on the factory floors. Take away my factories, but leave my people, and soon we will have a new and better factory.

—ANDREW CARNEGIE

The library as people reflects the shift away from building collections to building human capital, relationships and knowledge networks in the community. People are at the center of the library's mission to inspire and cultivate learning, advance knowledge and nurture and strengthen communities. While there are thousands of stories in the public library, the ones that matter most come with the people who use the library.

The public library comes alive when it is teeming with people from all walks of life:[16]

o **PARENTS** reading with their children in colorful, comfortable chairs

o **TEENS** learning how to write code for a new video game in a noisy learning lab

o **STUDENTS** meeting in a library classroom for group discussion as part of an online high school course

o **JOB SEEKERS** working on résumés in career centers, with guidance from a business librarian

o **ENTREPRENEURS** preparing presentations in coworking spaces, using the library-provided Wi-Fi and creating new products in maker spaces

o **IMMIGRANTS** learning English in classes and improving their job-seeking skills with the help of community mentors

o **RETIREES** using new online tools to create digital scrapbooks for their grandchildren

o **AUTHORS** publishing books on new library publishing platforms

In this people-driven environment, skilled librarians help people navigate new technology, manage vast amounts of data and meet their information needs. With the resources and know-how to deliver individualized learning and social experiences, the public library delivers a high-touch participatory experience to support personal goals. Library staffs anticipate individual and community needs and connect people to available resources, both locally and globally.

As the library's roles change and expand, library staff have refined and broadened their skills to meet new needs and define the library's continuing value to the community. They serve many roles, as coaches, mentors, facilitators and teachers more than as sources of information. Measuring outcomes is more important than measuring outputs. An intelligent community, not large circulation numbers, is the primary library goal.

LIBRARY AS PEOPLE:

GROW A READER EARLY LITERACY APP

The Calgary Public Library's Grow a Reader app takes the fun, interactive contents from popular early childhood literacy programs and delivers it to parents via their mobile devices.

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Parents who aren't able to attend programs with their toddlers can use the app to try out literacy skills and behaviors at home. Grow a Reader, which was designed by the library's Virtual Services and Children, Teens and Families departments with involvement of a video production company and an app developer, features 35 videos starring 10 library children services staff. The app can be updated easily by library staff so that vendors aren't needed on an ongoing basis. Calgary has a rapidly growing population and an ongoing "baby boom." In less than two months, the Grow a Reader app was downloaded 1,200 times. It has also made some library staff popular stars among young readers. One toddler seemed mesmerized by his teacher during a parent-child Mother Goose session because, his mother said, he enjoys watching the videos on mom's phone and recognized one of the library stars!

Andrew Sliwinski, co-founder and chief maker at DIY.org, addresses the need for new competencies and skills within libraries:

"Continuously extending the definition of the librarian is neither sustainable nor really in the long-term interest of the institution. Rather, specialization is needed with a focus on maximizing the ability for the human capital within the library, which is one of its largest resources, to engage with patrons. It is through this engagement that the values and the assets within each library can be most fully realized and leveraged by society."

Domain expertise is one of the new scarcities in a world otherwise overflowing with information. How does a library achieve such specialization without just hiring new librarians? How does a library get more librarians engaging with more people? In part, by leveraging its infrastructure to allow for this domain expertise to be shared outward, widely, from urban to rural and to draw from the expertise in the community.

Beth Jefferson, president and CEO of Bibliocommons, says a common descriptor given to librarians in the new information marketplace is "guides." But there is simply too much information for that to be a realistic goal, she says, and while collecting and mining data might be useful, "you need tons of data and the smarts to make sense of it."

"We are no longer gatekeepers; we are navigators."

—SUSAN HILDRETH

The better response, she says, is to talk of librarians as "curators" for their communities, and communities themselves as curators. The skill set libraries need is domain expertise, and for that libraries need to draw on the people in their communities to help design what Jefferson calls "collaborative filters" designed with the public interest in mind. Commercial search engines are great, but "their algorithms are designed with a for-profit point of view. Libraries are in a different business. Curation in the public interest is distinctly missing."

Building strong relationships with those who are providing content is an important goal of the people-focused public library. This includes not only publishers but also journalists, filmmakers, artists and information workers. Publishers and libraries have had a healthy relationship for a long time despite more recent controversies over e-book access and pricing. Digital technologies have disrupted the traditional publishing/ library supply chain. Consequently, libraries need to be sensitive to and engaged with the ecosystem that produces the content that gets into libraries, whether user-generated or professionally created content. This includes a recognition that an increasing amount of content produced is in new forms, especially large amounts of visual content, including video, photographs, maps and other forms of digitized and visualized data.

THE LIBRARY AS PLACE

The library is first and foremost a place...a place that promotes development in society. It is the family room of a community. That's the vision, that's the future.

—AKHTAR BADSHAH

Today's library is both a physical and virtual place, but it continues to be the physical presence of the library that anchors it most firmly in the community. Research and experience show that geography and place still matter.[17] The Pew Research Center's survey on library usage found that a large proportion of Americans, even those who seldom visit a library, consider libraries important institutions in their geographic communities and believe that their communities would suffer a loss if the library closed.[18]

In an increasingly virtual world, physical library places are community assets. They:

○ **ESTABLISH PERSONAL CONNECTIONS** that help define community needs and interests

○ **PROVIDE AN ANCHOR** for economic development and neighborhood revitalization

○ **STRENGTHEN COMMUNITY IDENTITY** in ways that yield significant return on investment, including drawing people together for diverse purposes

○ **PROVIDE A SAFE AND TRUSTED LOCATION** for community services such as health clinics, emergency response centers, small business incubators, workforce development centers and immigrant resource centers

○ **CREATE CONNECTING PLACES** in new locations that draw people together—shopping malls, big box stores, airports and mobile buses

PUBLIC LIBRARY USERS AND PROPONENTS ARE NOT A NICHE GROUP[19]

69% of Americans 16 or older report high to medium levels of engagement with public libraries
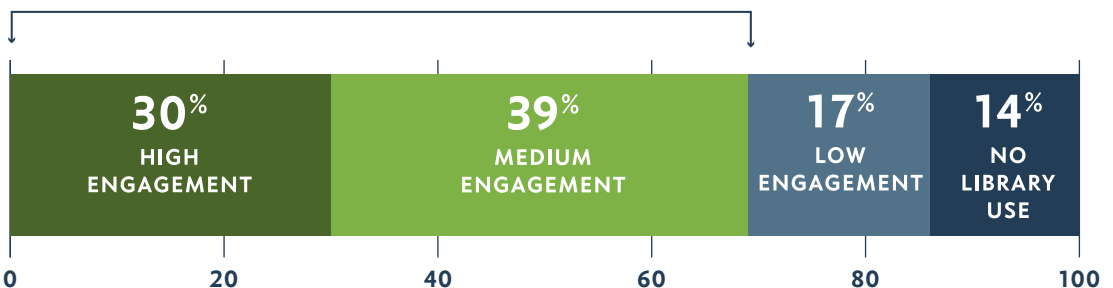
30% HIGH ENGAGEMENT	39% MEDIUM ENGAGEMENT	17% LOW ENGAGEMENT	14% NO LIBRARY USE

0   20   40   60   80   100

"Libraries have always been an economic driver of communities," says Robert Harrison, city administrator of Issaquah, Washington. "Libraries are like Starbucks without the coffee: an important place to build social connections. Anyone can use it."

The physical library will become less about citizens checking out books and more about citizens engaging in the business of making their personal and civic identities. As more information moves to digital formats, public libraries will hold less material locally in their physical collections. Library users will be able to access information digitally wherever it resides through library networks. While traditional computer work stations remain important and in demand, personal or shared mobile devices that provide easy connections to library Wi-Fi and high-speed broadband networks are becoming a dominant form of connection. The reduction in physical materials, greater customer mobility and the desire for more collaboration and creation are changing the nature of the public library's physical space.[20]

The physical library must undergo a transition that embraces the openness and flexibility needed to thrive in a world of constant change. Central to this flexibility is creating spaces that can adapt to the changing operational models of libraries.

The library's virtual presence must be as engaging as it's phyical space and fully serve the library's mission built around equitable access, learning and civic development.

In an article for *Library Journal,* architect Peter Gisolfi contrasts "the ways we were" in the 20th century model—quiet, large areas of stacks and extensive collections of printed material, an imposing circulation desk, modest community room—with emerging trends that recognize varied and new uses. These trends range from greater transparency among spaces, larger spaces for children and teens, meeting and activity rooms of different sizes to accommodate public events and performances or coworking and collaboration and technology-centric spaces.

Gisolfi advises, "Whether you build a new library or transform an existing one, do not build the best library of the previous century. Create an environment that facilitates new patterns of interacting, learning and accessing information and is sufficiently flexible to accommodate changes that inevitably will come."[21]

The public library remains a destination for many users, serving many purposes— personal quiet time for reading, research or homework; supervised afterschool activities until parents get home from work; public events and performances; innovation labs, hacker and maker spaces; and coworking and collaboration spaces.

Many libraries are creating spaces that are rich with tools and technologies that inspire and facilitate learning, discovery and creation and where experimentation is encouraged with trained library staff and community mentors. People and technology meet at the library. But as a learning place, the library becomes more than a destination, a term that suggests an end or arrival point. Instead, the library becomes a way station on the learning journey, a place that one passes through on the way to some other destination. This shift in role will impact the physical space of the library, the ways in which people interact with it and the types of services provided there.

In addition to being a physical space, the library in the digital age is a virtual space accessible from anywhere 24/7.

Websites, online discussion groups, classes, book clubs and library-hosted Wi-Fi hotspots are examples of the growing community presence of the always-open virtual library.

The library as it exists within virtual space must be considered as a wholly independent but highly integrated experience; that is, the library's virtual presence must be as engaging as its physical space and fully serve the library's mission built around equitable access, learning and civic development. Platforms must be conceived that address not only the operational and practical benefits of libraries but also benefits that are emotional and highly social.

NEW CONNECTIONS AND NEW PLACES

A theater in a library and a library in an airport are two examples of today's library as place.

The Ron Robinson Theater, part of the Central Arkansas Library System's main library campus, is a 315-seat multi-use venue with state of the art technology. At the theater, the library provides a range of programs, including films, music performances, plays, readings, lectures, speakers and children's activities. The library sought and won a bond issue to fund the construction of the building in a public-private partnership. In addition to the library's theater, the building includes retail stores, offices and a restaurant.

The theater is also used by other groups such as the Little Rock Film Festival and the Clinton School of Public Service. It enriches and strengthens the cultural, economic and educational life of the community.

The Free Library in Philadelphia partnered with the Airport Authority to open a virtual library at the Philadelphia International Airport. While relaxing in comfortable lounge chairs in a virtual reading room, customers can log on to the airport's free Wi-Fi to access the Free Library's e-books, nearly 1,200 author podcasts, and other digital content.

This requires thinking beyond the transaction that characterizes many online library experiences today. The public library should define what makes a great online public space. Yet there are hurdles to developing the online library experience beyond simple transactions and information retrieval, including the expertise to do so, insufficient financial and technical resources and the lack of adequate broadband capacity and digital literacy skills in many areas.

Library Wi-Fi in disadvantaged neighborhoods may address an issue that is echoed in the Pew Research Center's library user topology survey, *From Distant Admirers to Library Lovers–and Beyond,* which found higher rates of library use among the wealthier and better-educated members of the community and comparatively lower rates of library use in poorer and less-educated communities.[22] Easily accessible Wi-Fi may provide the spark needed to encourage residents to come into the physical library and explore the programs, workshops and services it has to offer.

In a new twist on providing Wi-Fi, the New York Public Library and Chicago Public Library have launched programs that provide take-home Internet access (Wi-Fi "hotspots") and digital training for residents in neighborhoods where digital access is low.

62% of public libraries report they are the **ONLY SOURCE OF FREE INTERNET** in the community[23]

EXPECTATIONS: When surveyed, people state that other institutions expect them to have online access at home.[24]

SCHOOL	83%
BANK/FINANCIAL INST.	65%
HEALTH INSURANCE CO.	53%
GOVT. AGENCY	50%
JOB/EMPLOYER	49%
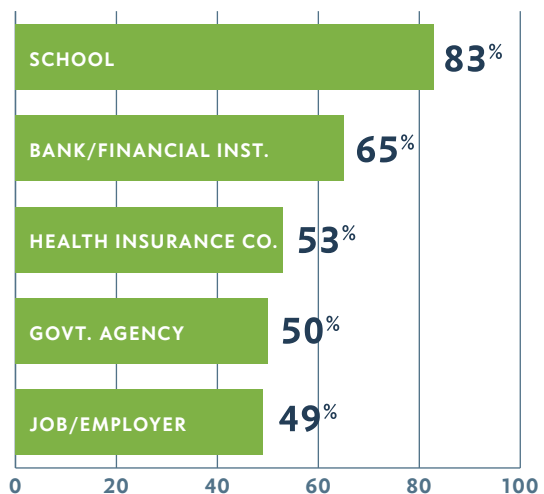
"From day one, we have worked to increase Internet connectivity and knowledge for our residents because today's digital skills are 21st-century workforce skills," said Mayor Rahm Emanuel at the time Chicago's "Internet to Go" program was announced.[25]

In keeping with the public library's focus on people, Chicago Public Library Commissioner Brian Bannon said during a panel discussion on the future of libraries at the 2014 Aspen Ideas Festival that the program "is less about the technology, more about the support of the individual, the family and the community."[26]

A great library platform is a "third place"—an interactive entity that can facilitate people operating individually or in groups.

THE LIBRARY AS PLATFORM

Every book, every idea, every image, every archive, every piece of information should not only be available for free online anytime, anywhere, but also needs to be curated and linked so that anyone in the world can engage in the creative activity that we all rely on to build a better world.

—ANTHONY MARX

The transformations of the digital age enable individuals and communities to create their own learning and knowledge. To that end, libraries become platforms—bases on which individuals and communities create services, data and tools that benefit the community.[27] They allow for innovation that the platform creators cannot anticipate. Users may "customize" the platform and adapt its resources to their individual needs, whatever those needs may be. The library as community learning platform is the innovative proposition of the public library in the digital age.

According to David Weinberger of Harvard University, the library platform can be thought of "as an infrastructure that is as ubiquitous and persistent as the streets and sidewalks of a town, or the classrooms and yards of a university. Think of the library as coextensive with the geographic area that it serves, like a canopy, or as we say these days, like a cloud."[28]

A great library platform is a "third place"— an interactive entity that can facilitate many people operating individually or in groups. The library platform supports the learning needs and goals of the community. To accomplish this, libraries embody the disposition of the entrepreneurial learner: seizing opportunities wherever they may exist, engaging others in the process. The library can then curate and archive the solutions created for sharing and future use. As a platform, the library promotes development in the community and society by identifying and filling gaps in community services including early-childhood education, lifelong learning, technology literacy and e-government.[29] The library as platform makes the library a participatory enterprise.

One distinguishing feature of the library as platform is that it is trusted to be objective and operate in the interests of its users. This is in contrast to commercial platforms that blur the line between user and commercial interests. In addition, the library is uncompromisingly free of charge. It differentiates itself from other "free" services by selling no ads and honoring the privacy of its users. Users may "opt in" to features that involve data sharing with third parties, possibly receiving extra benefits when they enter that bargain.

At the same time, as a platform, the library exploits its assets—content, human capital and expertise. It draws on those assets for community engagement and allows people to contribute their knowledge and experiences to those assets. The library as platform creates community dialogue that makes way for new expertise and creates social knowledge.

The library as platform sees itself as LaaS– "library as a service." Within the building itself, it starts with the biggest, fattest, most secure pipe that is possible, abundant Wi-Fi, devices for borrowing and a default embrace of new interface and display gadgets. Outside the physical library, it delivers these high-quality experiences on-demand to users wherever they may be and through whatever device they may use and for whatever purpose. Content may come from within the library's own collections, from a national content platform or anywhere in the cloud.

The library as platform radically reshapes the library's daily activities, shifting away from the old model of organizing and "lending" the world's knowledge toward a new vision of the library as a central hub for learning and community connections. It shapes the fire hose of information from the community as content is digitized and as social media and other comment-surfacing technologies bring forth data and insight about users and the community. The library's new activities include:

o Bringing analytical understanding to disorganized and abundant streams of information

o Connecting people seeking information to the resources, people or organizations that can provide it

o Synthesizing, analyzing, storing and curating information for those who want to consult material in the future

o Facilitating discovery and serendipitous encounters with information

o Helping people solve local problems

o Recruiting volunteers and specialists to participate in platform activities, especially by helping meet the needs of those querying the system

o Performing information concierge services and access to government services that are not at times delivered well by existing government agencies

LIBRARIES AS 21ST-CENTURY CURATORS

Libraries have long been known as curators of the community's culture and knowledge. This role involves organizing information, providing context, and connecting content in ways that add value for users and the community. As available content grows exponentially, the library's curator capacity becomes more important and more challenging.

Some libraries are leading public curation projects using crowdsourcing techniques to engage online communities. The library can curate or, in the case of these examples, provide the platform for curation to happen.

The **New York Public Library's Building Inspector project** is creating digitized images of maps that show building footprints in the city at particular points in time and making the maps widely available online. NYPL Labs is training computers to recognize building shapes and other data so that it can be compared over time and engaging city residents—operating as "citizen cartographers"—to check the accuracy of the computers' work. The process helps city residents see and tell the city's own story over time.

HTTP://BUILDINGINSPECTOR.NYPL.ORG/

Based at the DC Public Library in Washington, DC, the **MapStory project** is helping citizens to tell the stories of their neighborhoods and to see how they are evolving over time. With a grant from the U.S. Army Corps of Engineers, the MapStory Foundation team is designing a nonprofit global data commons built on open source code for anyone to use. There are map stories on the spread of bike lanes in U.S. cities and the spread of Walmart stores across the country. With funding from IMLS, the project is helping DC Public Library to digitize and geo-reference its extensive map collection.

HTTP://MAPSTORY.ORG/

> "The library is a place to catalyze curiosity. Curiosity, serendipity and imagination are things libraries can do well."
>
> **— JOHN SEELY BROWN**

CREATING GOOD COMMUNITY OUTCOMES

If the library as people, place and platform is the new knowledge institution that can serve the need for persistent opportunities for learning and social connection, what does it look like for the public library to fulfill this role? And in what ways does the community benefit?

The answers lay in understanding how the public library draws on its deep credentials as educators and civic connectors to reposition the library as a key hub for learning, innovation and creativity in this environment. Today, we see how the public library can be especially effective in the areas of informal and nontraditional learning, jobs and workforce development, addressing new literacies, fostering civic participation and closing broadband and participation divides. And innovators in communities of all sizes are inventing the new ways in which libraries will benefit the community for years to come.

COORDINATED, INFORMAL AND NONTRADITIONAL LEARNING

Public libraries provide a lifetime of learning opportunities for people in the communities they serve. They are especially effective at supporting informal learning, connecting diverse learning experiences, filling gaps between learning opportunities and offering new learning models that may not be feasible in schools, which face tighter boundaries and controls.

IMPACT OF LIBRARIES ON COMMUNITY[32]

Nationally, public libraries provide these community access services:

	0	20%	40%	60%	80%	100%
ACCESS TO DATABASES						
ONLINE HOMEWORK ASSISTANCE						
ONLINE EMPLOYMENT RESOURCES						
E-BOOKS						
DIGITAL REFERENCE						
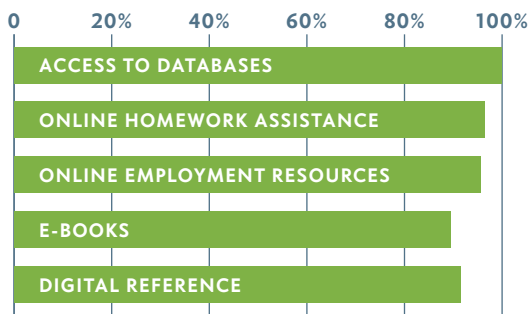
Public libraries are also increasingly providing these platform services that enable users to generate their own content and collaborate:

	0	20%	40%	60%	80%	100%
WORKSPACES FOR MOBILE WORKERS						
FREE VIDEO CONFERENCING						
MAKER/CREATOR SPACES						
AUDIO/VISUAL EDITING COMMONS						
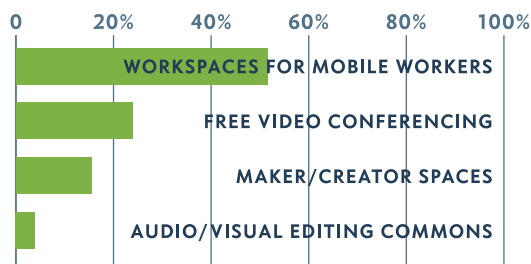
Drawing on the Dialogue's people, place and platform model, the process of re-envisioning public libraries calls for a stronger role in learning by being more intentional and strategic to produce better results. Actions to support this goal include:

- **Building partnerships** with local schools to support coordinated learning and reduce out-of-school learning loss

- **Expanding library roles in early childhood and prekindergarten** learning for children from low-income families to close achievement gaps, reduce dropout rates and help all children compete in the 21st-century economy

- **Stepping up to "own" afterschool and summertime learning programs** with well-designed curricula—such as engaging, participatory learning experiences created in partnership with schools, museums, recreation departments, and other community learning resources—that support and connect to school learning goals

- **Giving virtual learning experiences a physical presence** in the community by offering events, meet-ups and multigenerational learning spaces and providing information/access to the best apps to support virtual learning

- **Engaging youth** in dynamic learning labs that support interest-driven learning through use of digital media, mentors and networks of opportunity

- **Creating alternative pathways to learning**, credentialing and certification, and offering digital credentials, called badges, that recognize and acknowledge learning outside schools and formal educational institutions

JOBS AND ECONOMIC DEVELOPMENT

A library that is attuned to the challenges facing the community also has a deep understanding of its economic structures and challenges and the businesses that provide the jobs that sustain the economic health of the community. Libraries can help to accelerate workforce development and learning opportunities by providing a connection between industry and education. With its education and learning credentials and its connections, the public library is in a good position to connect community residents to the training and career development resources that local employers need. They can do this by partnering with local businesses, chambers of commerce and community colleges to provide access to curricula and resources, to technology and certification programs and to job search resources to maintain a highly skilled yet highly flexible workforce.

Of particular importance in the digital era is the library's ability to connect job seekers to the technology resources needed to find and compete for job opportunities, especially when 80 percent of Fortune 500 companies only accept online applications.[33]

While libraries increasingly are seen as part of the education infrastructure that serves children and schools, their role in the workforce infrastructure is newer and less well understood.

This is a time of enormous opportunity for public libraries to reach out to local and state governments, labor departments, economic development agencies and others to ask how the library can use its platform to create a 21st-century workforce that will keep current businesses in place and attract new ones to the community.

THE LIBRARY AS LITERACY CHAMPION

The 21st-century library is the champion of the literacies needed to navigate information abundance, create knowledge, bolster economic opportunity and make democracy dynamic. In the digital age, content is widely available in diverse formats outside traditional publications, requiring new skills to succeed in this information-rich environment. Building on its historic commitment to literacy, the library is uniquely positioned to provide access, skills, context and trusted platforms for sharing. Examples of new literacies include the ability to:

○ **INTERACT WITH TECHNOLOGY DEVICES AND CONTENT** at very different levels than ever before

○ **FILTER MASSIVE AMOUNTS OF INFORMATION** and translate it into knowledge in a highly complex environment

○ **SELECT THE RIGHT TOOLS** for knowledge creation and management

The public library can partner with the community to define the difference between highly literate and less literate—across a vast range of literacies, including civic, financial and health literacy—and then help close the gap.

Most importantly, the public library can work with community partners to provide personalized and flexible digital learning experiences that individuals need to become comfortable and adept at participating in digital society. [34]

JOBS AND ECONOMIC DEVELOPMENT:
LIBRARIES SUPPORTING WORKFORCE DEVELOPMENT

In **Omaha, Nebraska**, the Omaha Public Library has initiated new partnerships with the business community that build on the library's community engagement and learning work. The library is working with regional software companies and technology businesses looking for workers with software and design skills to establish workforce development initiatives that train area residents in these much-needed skills. The participating businesses are helping the library rethink its technology offerings to support workforce needs.

In **Memphis, Tennessee**, the Memphis Public Library's JobLINC mobile career center helps job hunters find employment opportunities and helps employers find new employees. The 38-foot bus delivers job and career resources to job seekers at convenient locations out in the community. It comes equipped with computers, email access, information resources and staff to assist with job listings, job applications, resume writing, interviewing and improving other skills.

In **New York City,** the Department of Small Business Services established one of its Workforce 1 career centers at the Brooklyn Central Library. The center prepares and connects city residents to job opportunities in the city, with emphasis on both job skills needed by local employers and soft skills such as interviewing that are equally important to getting a job.

THE LIBRARY AS CIVIC RESOURCE

The public library is a place for the community to experiment and collaborate, to gather and engage, and to explore and confront important community issues such as homelessness, immigration, economic development, public health and environmental sustainability. With its deep knowledge and relationships in the community, its physical presence and its platform, the public library is playing an important role in sustaining the civic health of the community. Libraries are carrying out this important civic role in the 21st century by:

o **SUPPORTING GOVERNMENT SERVICE DELIVERY** including public health education, immigration and citizenship services, government jobs information, disaster response and recovery information

o **ENGAGING CITIZENS IN THE GOVERNING PROCESS**, both through face-to-face participation and use of the library platform to strengthen citizen-citizen and citizen-government partnerships

o **CREATING NEW OPPORTUNITIES** to bring people of different backgrounds together to solve problems and build stronger communities

Civic engagement in the digital age takes on new dimensions with exciting opportunities for virtual engagement.

ADDRESSING THE BROADBAND AND PARTICIPATION DIVIDES

At the first Dialogue working group meeting, Susana Vasquez, executive director of LISC in Chicago, displayed a map of broadband use in Chicago in which those neighborhoods with the least connectivity matched almost exactly with a map of neighborhoods with the highest unemployment, crime and violence; the most school closings; and poorest health services. For many kids in these neighborhoods, Vasquez said, the library is the only public institution that works, that is accessible, safe and welcoming. Others, like schools or the police, kids engage "not by choice." "Libraries are not like that," she said. "It's a voluntary engagement. It's a trusted institution."

Public libraries are a critical institutional bulwark against the well-documented problem of growing income and educational inequality in the United States. One reason library use has risen in the last decade is that many Americans do not have home Internet access and face numerous obstacles to getting it. A 2013 Pew Research Center survey reported that only 70 percent of Americans have broadband access at home—in short, that the so-called "digital divide" remains persistent.[35] Among U.S. households with annual income below $30,000, 46 percent have no high-speed home Internet access.[36] The poor, in other words, cannot participate fully in the new learning and civic ecologies created by networked communications.

STRATEGIES
FOR SUCCESS

Connecting people to the world in a different way is the challenge of the 21st century for public libraries in communities of all sizes. Libraries long ago established their place in the hearts of their communities. Sustaining and broadening that position requires new thinking about what a library is and how it drives opportunity and success in today's world.

The Dialogue has identified four strategic opportunities for action to guide this continuing transformation:

o **ALIGNING LIBRARY SERVICES IN SUPPORT OF COMMUNITY GOALS**

o **PROVIDING ACCESS TO CONTENT IN ALL FORMATS**

o **ENSURING THE LONG-TERM SUSTAINABILITY OF PUBLIC LIBRARIES**

o **CULTIVATING LEADERSHIP**

Dealing with these challenges requires collaboration among library leaders, policy makers at all levels of government—particularly those closest to the library and people it serves—and public and private community partners and stakeholders. The range of partners and stakeholders can and should be broad, to include private sector businesses, local entrepreneurs, authors and publishers, technology experts, nonprofit organizations with shared priorities, journalists, educators, community foundations, library trustees, the public and more. The wider the reach in building partnerships, the greater the impact for libraries and the communities they serve.

ALIGNING LIBRARY SERVICES IN SUPPORT OF COMMUNITY GOALS

Public libraries that align their people, place and platform assets and create services that prioritize and support local community goals will find the greatest opportunities for success in the years ahead. Managers of local governments report that it is often difficult to prioritize libraries over other community services because libraries are not perceived to be unique in their public purpose when compared to other departments, such as museums or parks and recreation, that also serve a distinctly public mission. What libraries need is to be more intentional in the ways that they deploy resources in the community, and more deeply embedded in addressing the critical challenges facing the community. This will require a level of flexibility and adaptability to change as community needs change.

How should libraries go about this work of aligning with community needs? First, by developing relationships with local government and community leaders. Libraries need to be less autonomous and adopt more collaborative approaches to engaging with and building partnerships across the community.

"Think about how libraries fit into the overall strategy of communities, and how libraries can position themselves within the community to thrive," says Chris Coudriet, county manager in the County of New Hanover, North Carolina. This could include establishing libraries as creative hubs, or seeing the library as a one stop shop for community development.

> "The public library has moved from being an institution that primarily services individuals to one that navigates community."
>
> —TESSIE GUILLERMO

PROVIDING ACCESS TO CONTENT IN ALL FORMATS

As the public library expands from a house of books to a platform for learning and participation, its ability to provide access to vast amounts of content in all formats, from traditional print to the latest digital content, is vital. "The participatory organization," writes Nina Simon in her book, *The Participatory Museum,* "is a place where visitors can create, share and connect with each other around content."[39] Libraries face two immediate major challenges in providing access to content in all forms:

o Being able to procure and share e-books and other digital content on the same basis as physical versions

o Having affordable, universal broadband technologies that deliver and help create content

Dealing with both challenges have been high priorities for public libraries throughout the country as they strengthen their leadership role in the digital era. The challenges have been particularly acute for small libraries, those in rural communities and those in some urban areas where limited budgets make access to e-books and high-speed broadband difficult despite high community demand for and interest in both.

Ensuring access to e-books, other e-content and broadband is a big concern going forward because it impacts the public library's ability to fulfill one of its core missions—to procure and share the leading ideas of the day. Access to e-content is complicated by the lack of clarity in copyright law in the digital arena and the inapplicability of the first sale doctrine that governs the purchase and subsequent use of physical books.[40] A national digital platform could help. "The emergence of DPLA and more focus on a national digital library platform can have significant and positive results to increase free public access to information in the Internet age. The way we address barriers to free use, copyright, e-book issues, etc., will have great impact on our capacity to support an 'educated informed citizenry' and shape library services of the future," writes Mamie Bittner of the Institute of Museum and Library Services. Stakeholders must work together to find solutions that work for content creators, publishers and the public.

There are many ways in which libraries individually or collectively can partner with publishers large and small. One option is to consider a "buy-it-now" option, which exists on some integrated library systems (ILS) for managing content, where patrons could buy a book not currently available at the library and have the option to donate it back to the library when done so that others can get it.

This brings revenue, helps the mission and celebrates the book. Libraries split the revenue and it brings value to the publishers too. Such a proposal returns the public library back to the origins of the sharing library. Take that imperative and the library's digital public space, and this sets a common set of values on which a platform can be built.

On the broadband front, efforts to reform the federal E-rate program, which provides funds to libraries and schools to support Internet connections, presents an opportunity for addressing this critical need. "E-rate's structure should reflect the fact that libraries have become the number one source for public Internet access in the country, particularly for adults who do not have home computers or lack high-speed Internet connectivity," says Reed Hundt, who oversaw the creation of the E-rate program as chairman of the FCC from 1993 to 1997.

Internally, many libraries need massive upgrades of Wi-Fi connectivity to meet the burgeoning demand of "bring-your-own-device" connectivity. City library systems have many more users per year than rural, town or suburban libraries, and thus have different costs to cover, but all libraries need the same outcomes: high speed broadband that meets the needs of every library user and is not dependent on one's zip code.[41]

The clear need is for high capacity, easily scalable broadband in every public library. Specific target speeds are subject to ongoing debate, as the actual needs of individual communities may vary considerably. However, the nation's major public library associations have called for one gigabit connectivity to schools and libraries, writing in support of "advancing President Obama's goal of connecting our students and their communities to the one gigabit speeds we know are necessary for many libraries today and for the remaining libraries tomorrow."[42] High capacity connectivity will be necessary, especially in high-use public libraries, to support peak platform uses including new learning, creative and collaborative uses and higher bandwidth applications like video.

Collaboration among libraries, content creators, publishers, government officials/policy makers and community leaders is vital to overcoming these challenges. Together, they must address questions surrounding the library's role in (a) nurturing and sustaining vibrant cultural ecosystems, (b) learning and reading in a radically changing environment and (c) an evolving content ecosystem.

ENSURING LONG-TERM SUSTAINABILITY FOR PUBLIC LIBRARIES

Perhaps the greatest challenge facing public libraries today is to transform their service model to meet the demands of the knowledge society while securing a sustainable funding base for the future.[43] With limited and sometimes volatile funding, however, such transformations will be uneven and incomplete. In addition, the highly local nature of public library funding and governance structures may interfere with both rapid and broad scale progress—the kind of scale needed to compete and thrive in a world of global networks. Challenges that shape the discussion about long-term public library sustainability, given their vital role in the digital era, include:

o   Identifying reliable sources of revenue for daily operations as well as long-term planning and investment

o   Exploring alternative governance structures and business models that maximize efficient and sustainable library operations and customer service

o   Becoming more skilled at measuring outcomes rather than counting activities

o   Balancing the local and national library value proposition to consider economies of scale in a networked world without compromising local control

FUNDING. Public libraries have long relied on local funding sources. According to a recent IMLS public library survey, nearly 85 percent of all public library operating revenue comes from local sources, including general revenue funds, dedicated property taxes, voter-approved taxes and a portion of sales taxes. Nationally, libraries receive about 7.5 percent of their annual revenue from states and only one-half of one percent from the federal government. Other sources accounted for just over 7 percent.[44] In some cases, notably in small cities and rural areas, libraries struggle to keep up because of extremely limited and unpredictable funding.

"A lot of elected officials who make decisions on funding haven't been in a library in years. There is a need to get these officials in the [library] building to understand how libraries function now. Getting people invested will educate them and open their eyes to the importance of libraries," says Amy Paul, corporate vice president of Management Partners, a consulting firm that works with local governments to improve their operations.

Moving toward financial sustainability requires a willingness to explore new avenues for funding, including opening up discussions about endowing public libraries in ways similar to other educational and cultural institutions. Libraries themselves must look at alternatives to traditional funding models, such as revenue or resource sharing, which require new or different skills that some libraries currently do not have.

GOVERNANCE STRUCTURES. Closely related to funding are library organization and governance structures. Library governance structures vary widely. For example, some libraries are part of a county or municipal government, others function as a special district or operate under joint powers authority agreements among participating jurisdictions. A few libraries are 501(c)3 nonprofit organizations.[46] A comprehensive, up-to-date mapping of library governance and funding models is needed as a starting point for a national discussion about long-term public library sustainability. That conversation could examine what the most effective models are for long-term sustainability and advocate for those models. For example, Pam Sandlian-Smith, CEO of Anythink Libraries in Colorado, commented on the transition of her library system from county funding to a special taxing district model: "Special taxing districts are effective for longer-term planning and transformation. They provide certainty and are less open to political changes."

BUSINESS MODELS. Even if public libraries had all the money in the world, they would still need to change the way they do business in the digital era. This includes developing new organizational and business models and considering new frameworks for funding. New business models should be based on the library's intellectual, space and data assets—its people, place and platform assets. There are two sides to a business model: cost savings and new revenue sources, or profit centers. While government should continue to be the primary funder of public libraries, there is room for libraries to explore new revenue streams, new partnerships that can yield new revenues and a modern business plan. Suggestions for new thinking include outcome-based funding models and libraries formed around enterprises.

MEASURING OUTCOMES. For a long time, the impact of the public library has been measured by what the library could count—patrons who walked through the doors, books and other materials checked out, the number of people in seats at training classes or other programs. But the measurements that matter most—to government officials, foundations, donors, and community stakeholders—are outcomes that report how the library is helping to achieve community goals and objectives. This will require libraries to think differently about data and to assess, on a broad scale, the outcomes they achieve and the impact they make on the lives of individuals and the community.[47]

Partnerships allow communities to leverage many of the resources in the community for greater impact and benefit. The library often plays a key role as a connector in forming relationships across the community. Systemic rather than ad-hoc partnerships are important for nurturing and growing relationships and for building network connections. Partnerships that start from the center of the library system and reach out to as many neighborhoods, communities, and branches as possible are also particularly desirable and productive.

For example, Nashville, Tennessee, is home to a diverse set of ethnic communities, including Kurdish, Somalian and Latino populations. When the city wanted to connect with these new populations to encourage local involvement and citizenship, public libraries became the connectors between the community-based organizations (CBOs) and these new residents. "If you want to reach out and help new Americans and citizenship in your city, there are lots of organizations who want to do the work, but libraries become the connectors between the CBO and citizens," Nashville Mayor Karl Dean told the Dialogue.

As the breadth of the library's role and impact in the community continues to evolve, leadership and professional development will be crucial to continued success in the digital era. Library leaders will need to design transformative change and become experts in their communities. They will also need to invest in developing their staff in ways that may be very different from what they learned in school or have done in the past. Libraries will need fewer staff to put books on shelves and a lot more staff to be educators. Library training and professional programs will have to change. People with new and diverse skills will be hired.

Key leadership challenges for the library profession in general and individual library directors include:

o **TAKING ADVANTAGE OF DIGITAL TOOLS** to share resources, create new channels for information about what works and diffuse innovation more rapidly and effectively

o **BUILDING THE CAPACITY OF THE LIBRARY FIELD** to develop new business models and experiment, which may include looking outside the United States to library innovators around the world

o **BUILDING CAPACITY** to meet the evolving demands and needs of new educational models and opportunities

o **GIVING GREATER THOUGHT AND ATTENTION TO SUCCESSION PLANNING** to develop bench strength and focus on the skills that will be needed for the library of the future

o **INCLUDING TRUSTEES AND FRIENDS GROUPS** in leadership development activities as part of a broader effort to engage and create library champions and advocates at every level

o **DEVELOPING PLANS AND STRATEGIES** for keeping pace with disruptive changes in the environment and establishing multiple channels for sharing information widely about changes, successes, opportunities and leadership needs

CONCLUSION AND A CALL TO ACTION

Visions are by nature aspirational, as are public libraries. Libraries reflect the community at its best—engaged, striving, participating, achieving, discovering, creating and innovating. The power to re-envision public libraries is the power to re-envision our communities for success in the digital era.

Re-envisioning the public library for every community will require a unity of purpose and action by stakeholders at all levels. Everyone has a stake in building healthy and engaged communities; every stakeholder is a library stakeholder.

Acting on the framework presented in this report starts with a shared recognition of the vital role public libraries are playing, will play and can play in the digital arena and a commitment to take advantage of the possibilities.

To get started, public libraries, library directors, library staff and their supporters must forge new partnerships and collaborations in the community and align their work with the community's goals. But libraries and their supporters are only one part of the equation. Re-envisioning the public library is a broad effort that requires the community and its elected leaders to recognize their stewardship of this valuable public asset. Accordingly, government and other leaders are called upon to support the transformation of public libraries by heeding the call to action and advancing the actions steps recommended in this report.

Leadership at the local level is crucial, as public libraries are a quintessentially local institution of democratic society. However, if we are to realize the vision of a national digital platform and networks of knowledge, innovation and creativity spanning the country, then state and national leadership and investment will be essential to coordinating and sustaining such an enterprise.

Library, government and civic leaders will have to adopt new thinking about the public library if we are to achieve a nation of informed, engaged communities. This thinking rests on understanding what makes the library uniquely valuable to the communities beginning with its people, place and platform assets upon which the community can build a successful future together. It also rests on the uniquely public value proposition grounded in the principles of equity, access, opportunity, openness and participation. These are also values at the heart of American democracy. While the vision speaks to the role of the public library and its relationship to the public, it is essentially a vision for the quality of the democratic communities that we want to nourish and sustain in the 21st century.

Libraries are essential partners with government, business and nonprofit community partners in achieving our national aspirations. All stakeholders should ask themselves, ***what can I do to help connect the community to the 21st-century knowledge society?***—and then go to the public library to learn the answer.

15 Action Steps for
LIBRARY LEADERS

1. Define the scope of the library's programs, services and offerings around community priorities, recognizing that this process may lead to choices and trade-offs.

2. Collaborate with government agencies at the local, state and federal levels around shared objectives. This includes partnerships with schools to drive learning and educational opportunities throughout the community.

3. Partner with local businesses, chambers of commerce and community colleges to provide access to curricula and resources, to technology and certification programs and to job search resources to maintain a highly skilled yet highly flexible workforce.

4. Engage the community in planning and decision making, and seek a seat at tables where important policy issues are discussed and decisions made.

5. Connect resources from other agencies or libraries to the library platform rather than reinventing the wheel or always going solo.

6. Develop partnerships and collaborations with other libraries and knowledge networks that can contribute to efficiencies, using the opportunities provided by digital technologies.

7. Support the concept of a national digital platform to share collections nationally while continuing to maintain a local presence and focus; participate in content-sharing networks and platforms.

8. Deploy existing resources in new ways.

9. Collaborate in negotiations with publishers on reasonably priced and easily accessible access to e-content and develop win-win solutions like "buy-it-now" options.

10. Provide mobile devices for in-library, in-community and at-home use.

11. Measure library outcomes and impacts to better demonstrate the library's value to the community and communicate these outcomes to key partners and policy makers.

12. Communicate the library's story of impact directly to the public, partners, stakeholders and policy makers. Include the new vision built on the library's people, place and platform assets.

13. Develop a richer online library experience and stronger competencies in using digital and social media to demonstrate the library's role in the digital transformation.

14. Change long-held rules and operating procedures that impede the development of the library's spaces and platform.

15. Take proactive and sustained steps to brand the library as a platform for community learning and development.

FEDERATION OF ONTARIO PUBLIC LIBRARIES RESEARCH

Prepared for: Federation of Ontario Public Libraries Research Task Force

April, 2015

Market Probe

- Ontarians' overall opinions of the public library and the value it contributes to the communities it serves remain very strong.

  - The public library's position relative to other municipal tax-supported services is consistent with the findings from five years ago, and reactions to positioning statements included in the previous study have actually improved slightly.

  - Reacting to new positioning statements tested this year, most Ontarians acknowledge the public library's role in advancing literacy, equal opportunity, and quality of life in their communities.

  - The value of certain services (early literacy programs, services to new Canadians, information for the unemployed, training in how to access information online, and being a focal point or meeting place within the community) has increased over the past five years.

  - A majority of Ontario residents feel that if their local library were to close, it would have a major impact on their community (but usually less of an impact on themselves and their family).

- Numbers of library users have stayed relatively consistent, but usage patterns have changed significantly over the past five years.
  - The proportion of adults not using the public library at all in the previous 12 months has not risen over the last 15 years, in spite of the fact that information has become increasingly available from other sources.
  - Individuals' library card ownership has increased since 2010, however there are signs that library usage at a household level may be softening slightly.
  - In-person library visit frequency has not changed since the first year the study was conducted, but 2015 represents the first time that the number of people using the library both online and in-person during the past year has overtaken the number of in-person-only visitors.
  - People appear to be more selective in choosing which library services to take advantage of, as reported usage of many library services is down significantly versus five years ago (wireless network access being the main exception).

- Evolving technology, channel, and media preferences will require the public library to review its strategies and tactics on a regular basis.
    - It has become clear that electronic access is complementing, not replacing, bricks and mortar establishments, implying that duplication of hard copy and electronic materials, as well as increased channel costs, are likely to continue for the foreseeable future.
    - Perhaps equally daunting is the need to ensure compatibility with an ever expanding array of devices being used to access the Internet (and particularly challenging to libraries, the substitution of multi-purpose tablets and smartphones for single-purpose devices like e-readers).

- Effectively communicating information about new services will be as critical as deciding which to invest in.
    - While still important, traditional library services, such as lending materials and helping people find information, are not increasing in usage or perceived value.
    - Interest in new service concepts is fragmented, meaning hard decisions will need to be made about which to develop and roll out, and for which audiences.
    - New services will need to be publicized as they become available, and in many instances, communications will have to be geared to relevant segments to create sufficient awareness, interest, and take-up.
    - Since email is clearly the preferred method of receiving information about the library, creation of user groups and maintenance of contact lists will likely become critical in order to reach segments of interest and establish an ongoing dialogue with users.

Market Probe

- The future of the public library remains uncertain and must be shaped according to the needs of a new generation of users.
  - Older people will undoubtedly continue to value the library for its heritage and social value, but those feelings will not automatically be passed down to a younger generation that likely has different views of public institutions, not to mention unique information needs and media habits.
  - Not every library can afford to be all things to all residents of the community it serves, so there may be a need to develop specific capabilities centrally or in selected locations, along with the means of delivering them on a more universal basis.
  - Finally, the library needs to address a challenge that was identified when this study was first conducted and which still remains in 2015 – how to convince more people that the public library can be of as much value to them personally as they think it is to others.

- This represents the fourth wave of a study that has been conducted every five years since 2000.

- Consistent with past waves, objectives of this year's study were to:
  - Understand Ontario residents' opinions about the use, role and impact of public libraries, and how those opinions have changed over time;
  - Separate public opinion by level of usage of public libraries (including non-use); and
  - Identify areas of strength and weakness for the public library.

- Results will be used to:
  - Monitor the status of the library;
  - Formulate strategy to ensure libraries remain a relevant and useful part of the community;
  - Identify priorities for 2015-2017; and
  - Provide input to the creation of a new marketing communication plan.

- Many of the charts contain profiling information for a key variable, which is indicated by a blue arrow pointing away from it toward a sidebar. In the chart below, the key variable is the percentage of respondents who said they used the public library in the past year (66%). The sidebar shows the same statistic within specific groups. For example, the first category break in the sidebar shows that the percentage who have visited the library among those who are cardholders is 81%, while among non-cardholders it is 25%.

Yes
- 66% (2015)
- 66% (2010)
- 66% (2005)
- 68% (2000)

Legend: ■ 2015 □ 2010 ■ 2005 □ 2000

No
- 34% (2015)
- 34% (2010)
- 34% (2005)
- 32% (2000)

0% 20% 40% 60% 80% 100%

66% in the total population, but 81% among library cardholders

Cardholder
Yes	**81**
No	25

Bookstore Use
None	53
1-10 times	**65**
11+ times	**75**

Library vs. Bookstore Usage
More	**97**
Same	**85**
Less	41
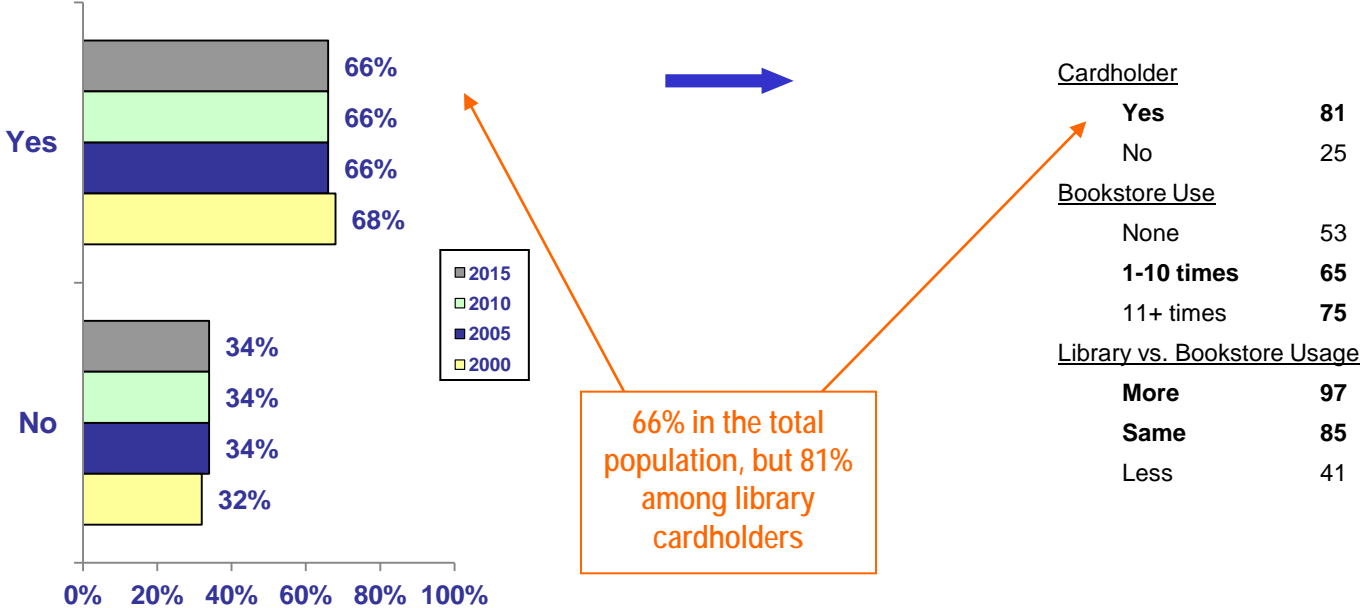
- Throughout the report, a red circle ◯ or square ☐ indicates that a 2015 observation is significantly higher or lower, respectively, than the previous survey. **Bold text** within sidebars indicates that, for 2015, the bolded subgroups' results are significantly higher than one or more of the non-bolded groups' results.

Market Probe

- Compared to previous study waves, there has been an increase in the number of Ontarians claiming to be cardholders.
- The desire to have Internet access, both to and while at the library, may be promoting increased card usage.
- Interestingly, cardholder incidence does not vary significantly across the different age groupings.

Yes
- 73%
- 68%
- 65%
- 65%

No
- 26%
- 32%
- 35%
- 35%

Legend:
- 2015
- 2010
- 2005
- 2000
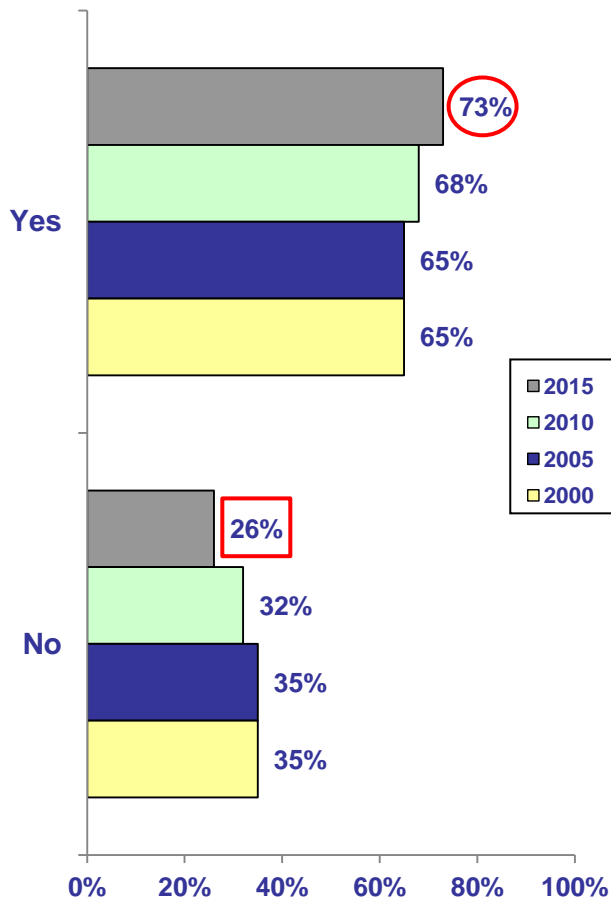
In-Person Library Use
None	40%
1-10 times	**85%**
11+ times	**96%**

Social Media Interaction with Library
Yes	**84%**
No	72%

Bookstore Use
None	65%
1-10 times	73%
11+ times	**78%**

Age*
18-24	77%
25-34	72%
35-54	73%
55+	72%

Access Library by Phone / Text
Yes	**93%**
No	67%

Access Library by Internet
Yes	**92%**
No	59%

Have Internet Access
None	66%
Work	72%
Home	74%
School	80%
Library	**93%**
Other	76%

Books Read in Past Year
None	47%
1-5	**63%**
6-15	**80%**
16+	**84%**

Library vs Bookstore Usage
More	**97%**
Same	**88%**
Less	52%

Library Benefits
Top	**84%**
Middle	**70%**
Bottom	52%

Children in Home
Yes	**78%**
No	70%

Education
High school	65%
Univ/college	**77%**
Grad school	68%

Region
North	62%
East	68%
Southwest	**81%**
Metro T.O.	74%
GTA Urban	75%
GTA Ex-urban	69%

Q.1
Base: All respondents (2000 - 1007; 2005 - 1102; 2010 - 1100; 2015 - 600).
*Notable for lack of difference.

Market Probe

8

Federation of ONTARIO PUBLIC LIBRARIES

- As has been the case since 2005, two-thirds of Ontarians report visiting the library in person within the last year.

- In-person use of the library skews to younger age groups and those with higher education, and appears to be more prevalent in Southwest Ontario.

Yes
- 66% (2015)
- 66% (2010)
- 66% (2005)
- 68% (2000)

No
- 34% (2015)
- 34% (2010)
- 34% (2005)
- 32% (2000)

Legend:
- 2015
- 2010
- 2005
- 2000

X-axis: 0% 20% 40% 60% 80% 100%
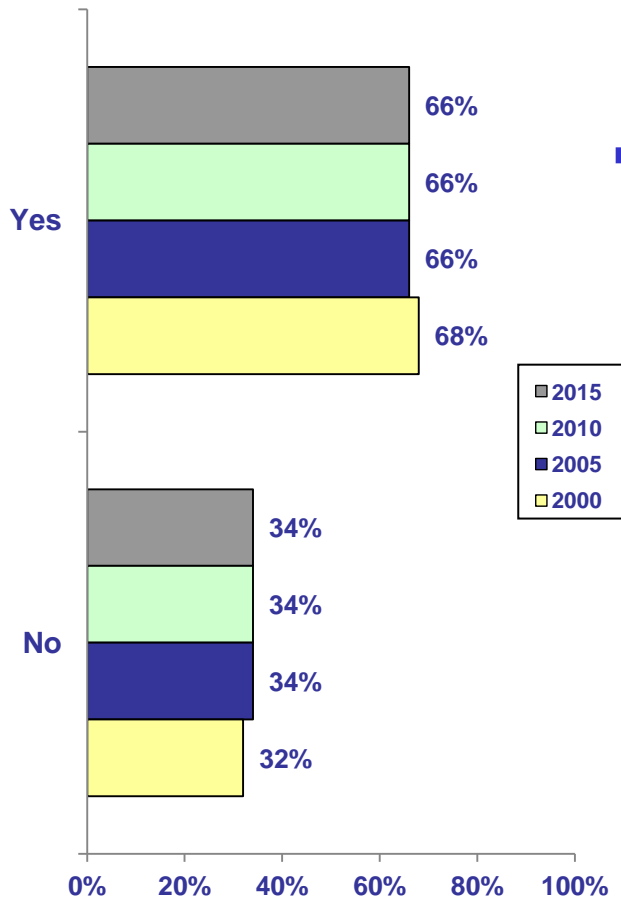
Cardholder	
Yes	**81%**
No	25%

Books Read in Past Year	
None	22%
1-5	**56%**
6-15	**78%**
16+	**79%**

Bookstore Use	
None	53%
1-10 times	**65%**
11+ times	**75%**

Library vs. Bookstore Usage	
More	**97%**
Same	**85%**
Less	41%

Access Library by Phone / Text	
Yes	**93%**
No	57%

Have Internet Access	
None	48%
Work	66%
Home	68%
School	77%
Library	**93%**
Other	71%

Access Library by Internet	
Yes	**93%**
No	46%

Social Media Interaction with Library	
Yes	**86%**
No	64%

Future Importance of Library	
More	**77%**
Same	**66%**
Less	57%

Library Benefits	
Top	**79%**
Middle	**64%**
Bottom	34%

Age	
18-24	**73%**
25-34	**71%**
35-54	66%
55+	61%

Children in Home	
Yes	**75%**
No	61%

Education	
High school	57%
Univ/college	**69%**
Grad school	**72%**

Region	
North	56%
East	61%
Southwest	**73%**
Metro T.O.	65%
GTA Urban	69%
GTA Ex-urban	61%

Q.2
Base: All respondents (2000 - 1007; 2005 - 1102; 2010 - 1100; 2015 - 600).

Market Probe

- Despite the increased use of other channels, frequency of visiting the library in person has not changed significantly over the past 15 years. In fact, those who access the library by electronic means are also more apt to report having made a greater number of in-person visits.

- The percentage of library visitors who visit frequently (over 20 times in the past year) varies quite a bit by region.

21+ times
- 26% (2015)
- 27% (2010)
- 26% (2005)
- 28% (2000)

11 to 20 times
- 14% (2015)
- 16% (2010)
- 18% (2005)
- 17% (2000)

6 to 10 times
- 18% (2015)
- 19% (2010)
- 16% (2005)
- 18% (2000)

1 to 5 times
- 41% (2015)
- 38% (2010)
- 40% (2005)
- 37% (2000)

Legend: ■ 2015 □ 2010 ■ 2005 □ 2000

0% 20% 40% 60% 80% 100%

Cardholder
Yes	**29%**
No	8%

Books Read in Past Year
None	21%
1-5	8%
6-15	14%
16+	**41%**

Library vs. Bookstore Usage
More	**44%**
Same	**17%**
Less	5%

Access Library by Phone / Text
Yes	**39%**
No	20%

Access Library by Internet
Yes	**34%**
No	16%

Social Media Interaction with Library
Yes	**39%**
No	25%

Future Importance of Library
More	**34%**
Same	25%
Less	20%

Library Benefits
Top	**35%**
Middle	21%
Bottom	9%

Region
North	**32%**
East	21%
Southwest	**32%**
Metro T.O.	**34%**
GTA Urban	17%
GTA Ex-urban	29%

Q.2
Base: Past-year public library visitors (2000 - 678; 2005 - 712; 2010 - 723; 2015 - 394).

- In 2015, a modest gain has been made in library users obtaining materials via the library's website, with fictional E-books rising significantly in popularity.

- Compared to previous study waves, reported use of E-audiobooks has tended to level off, while accessing of the library's E-local history or genealogy information has gradually been declining over the past 10 years.

Accessed Materials via the Library's Website

	Yes	No
2015	14%	86%
2010	12%	88%
2005	7%	93%

	2015	2010	2005
E-books fiction	59%	40%	41%
E-books non-fiction	48%	37%	39%
Digital movies	34%		
E-audiobooks	30%	27%	
E-local history or genealogy information	24%	26%	31%
Digital music	23%		
E-newspapers or journal articles*	22%	43%	36%
E-magazines	21%		
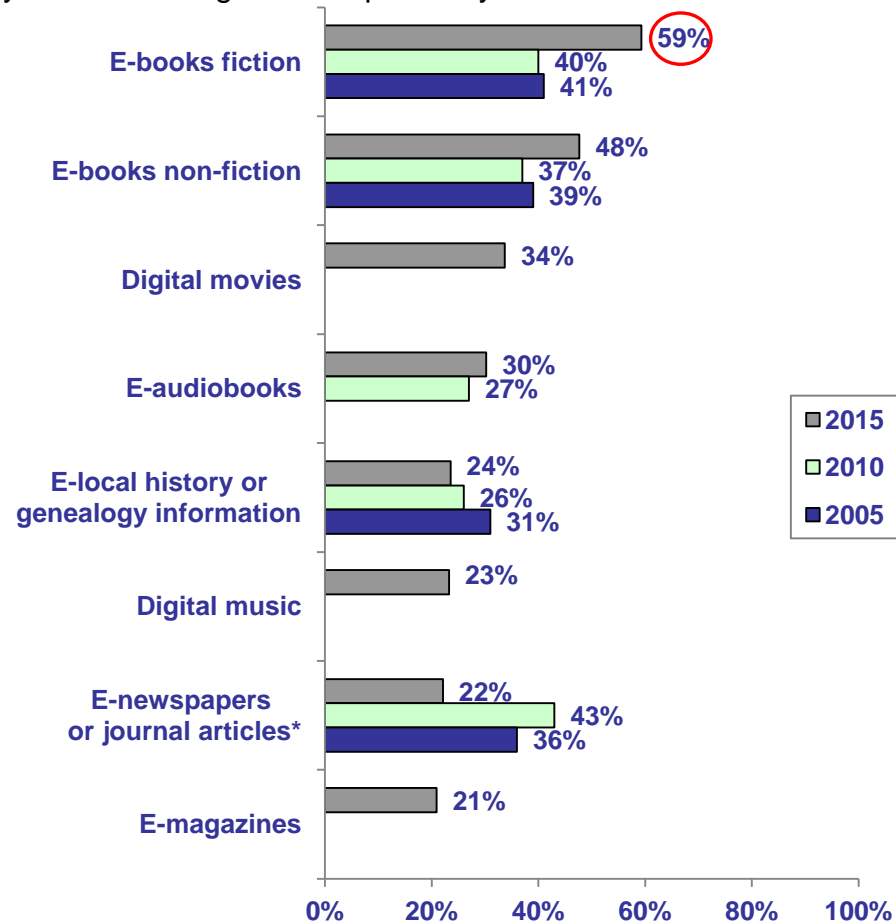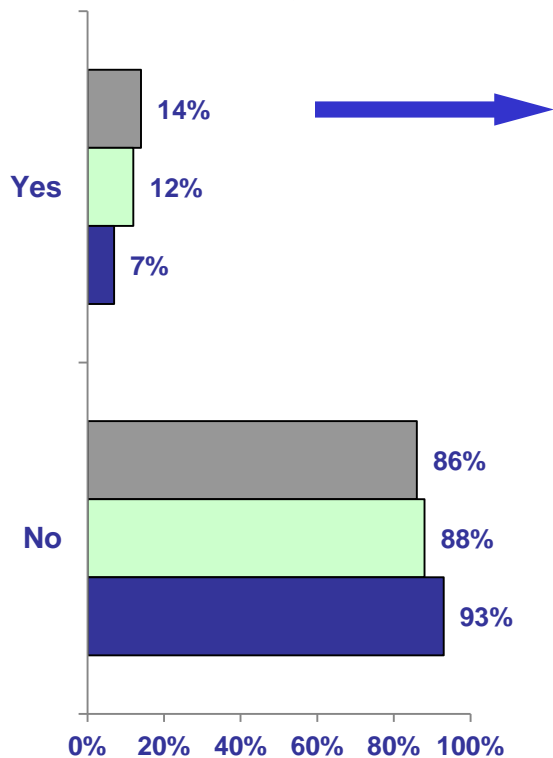
Q.8a/b
Base: All respondents (2005 - 1102; 2010 - 1100; 2015 - 600); those who accessed electronic materials on library's web page (2005 - 62; 2010 - 134; 2015 - 86).
*Wording changed in 2015 from "E-periodicals, E-newspapers or journal articles".

Market Probe

11

Federation of
ONTARIO
PUBLIC
LIBRARIES

- The diagrams below depict all past-year library users according to their reported methods of accessing the library.

- While in-person only visitors constituted the largest group of library users in 2010, they have been outnumbered by combined in-person/Internet users in 2015.

- The proportion of library patrons using all three access methods has also increased over the last five years, while the total percentage visiting the library in person remains extremely high, at 94%.

2015

In-Person

27%

11%   36%

Phone   20%

1%   1%   3%

Internet

2010

In-Person

37%

12%   33%

Phone   13%

1%   1%   2%

Internet

Q.2/3/4
Base: Library users (2010 - 757; 2015 - 417).

Market Probe

Federation of **ONTARIO PUBLIC LIBRARIES**
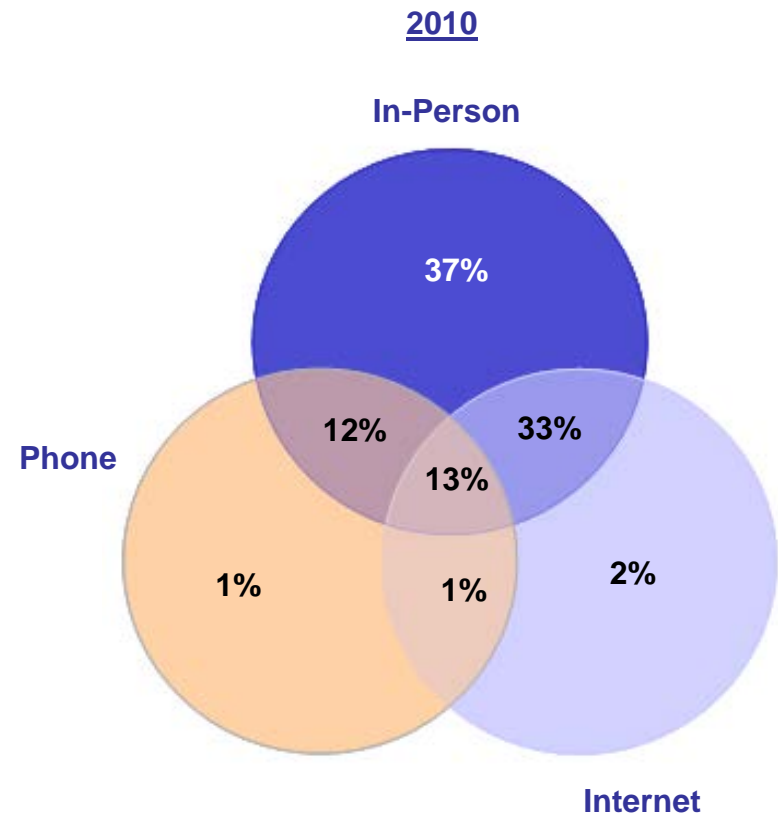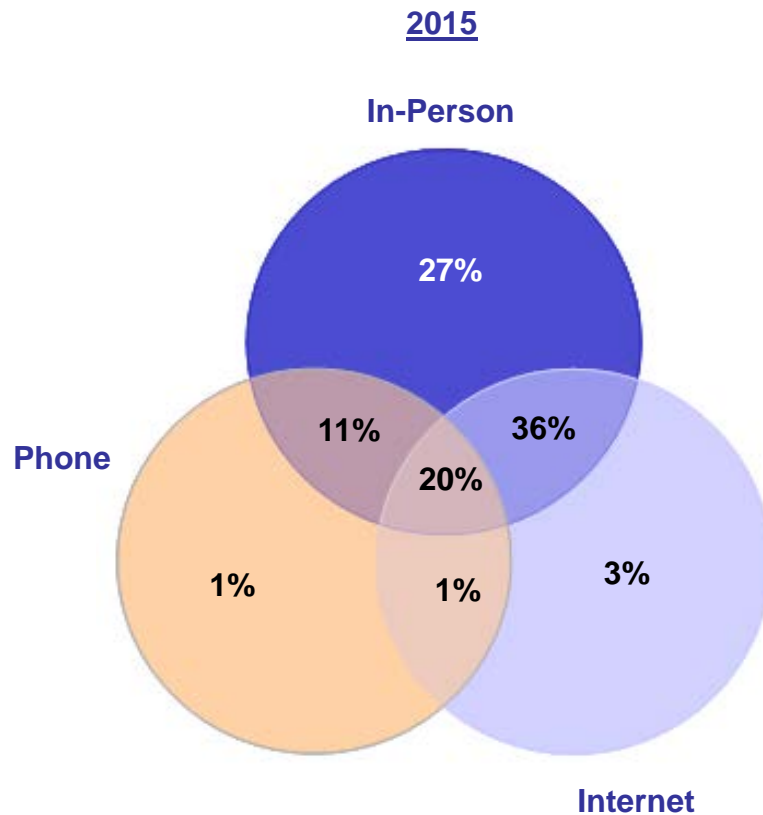
- After rising in 2010, the reported incidence of children using the public library has declined significantly in 2015 (although some of the reason for this could be due to slight wave-over-wave changes in household composition).

- Family usage of the library increases with education level and is more prevalent among medium and higher income households.

Used by Others (net)
- 49%
- 50%
- 47%
- 51%

Children
- 26%
- 31%
- 27%
- 24%

Spouse/partner
- 22%
- 23%
- 19%
- 17%

Others
- 8%
- 8%
- 7%
- 9%

Legend:
- ■ 2015
- □ 2010
- ■ 2005
- □ 2000

X-axis: 0% 20% 40% 60% 80% 100%
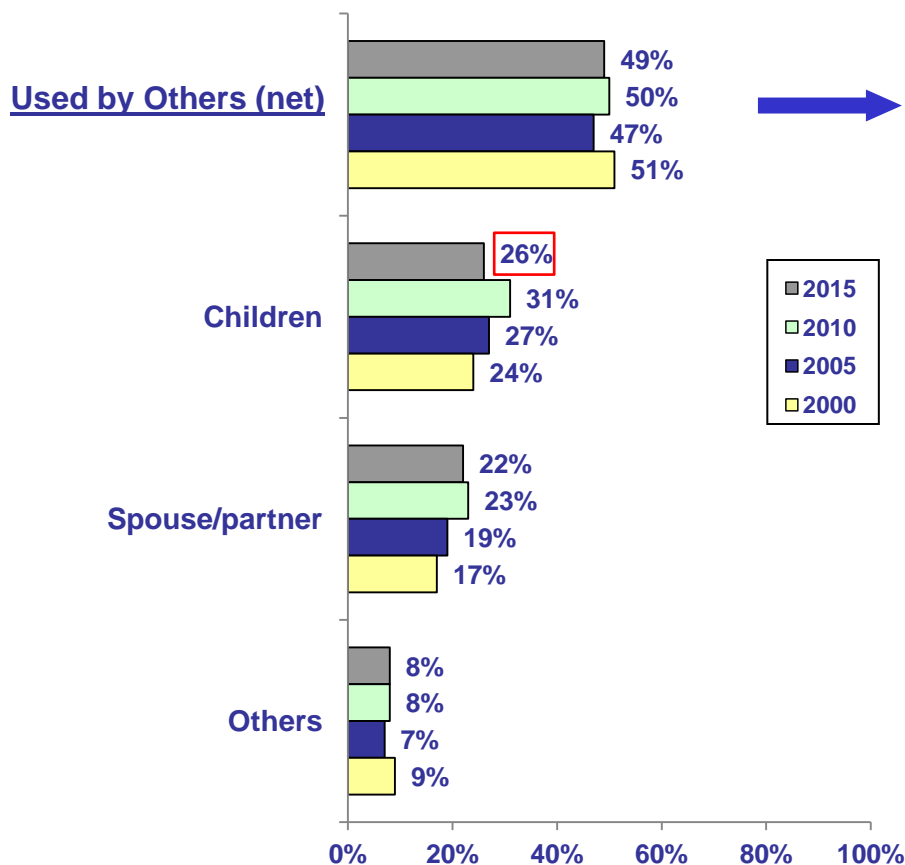
Cardholder	
Yes	**55%**
No	31%

In-Person Library Use	
None	24%
1-10 times	**58%**
11+ times	**66%**

Bookstore Use	
None	30%
Any	**53%**

Library vs. Bookstore Usage	
More	**63%**
Same	**64%**
Less	40%

Access Library by Phone / Text	
Yes	**62%**
No	45%

Access Library by Internet	
Yes	**69%**
No	34%

Library Benefits	
Top	**53%**
Middle	**51%**
Bottom	34%

Age	
18-24	**51%**
25-34	**64%**
35-54	**54%**
55+	36%

Children in Home	
Yes	**75%**
No	36%

Education	
High school	40%
Univ/college	**52%**
Grad school	**62%**

Income	
<$35K	28%
$35K - <$75K	**52%**
$75K+	**59%**

Q.5a/b
Base: All respondents (2000 - 1007; 2005 - 1102; 2010 - 1100; 2015 - 600).

- Taking the total population into account and comparing with 2010, the most notable differences in usage are a slight increase in library non-user households and a corresponding decrease in households where the respondent didn't use the library but others in the household did.

- As was the case five years ago, over three-quarters of Ontario households are using the public library, and the majority of households that are using the library contain more than one user.

2015

Respondent Only
27%

No One
24%

Total Users = 70%

Other Household Member(s) Only
7%

With Others in Household
42%

2010

Respondent Only
28%

No One
21%

Total Users = 69%

Other Household Member(s) Only
10%

With Others in Household
41%

Q.2/3/4
Base: All respondents (2010 - 1100; 2015 - 600).
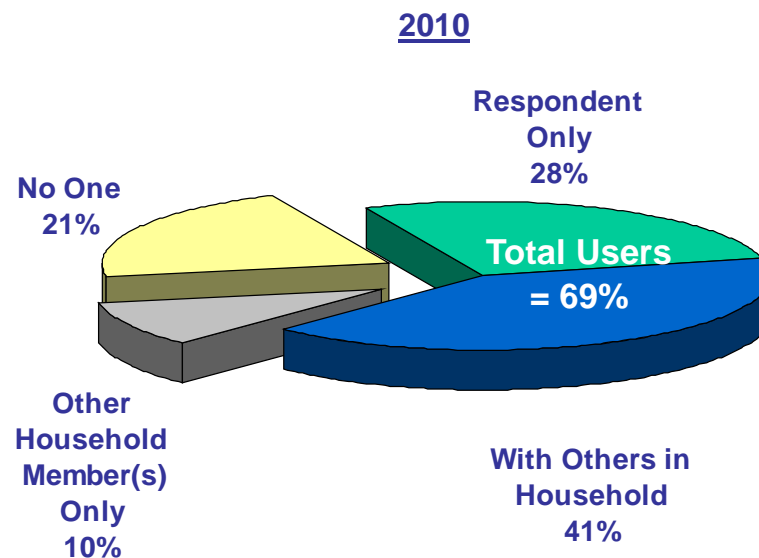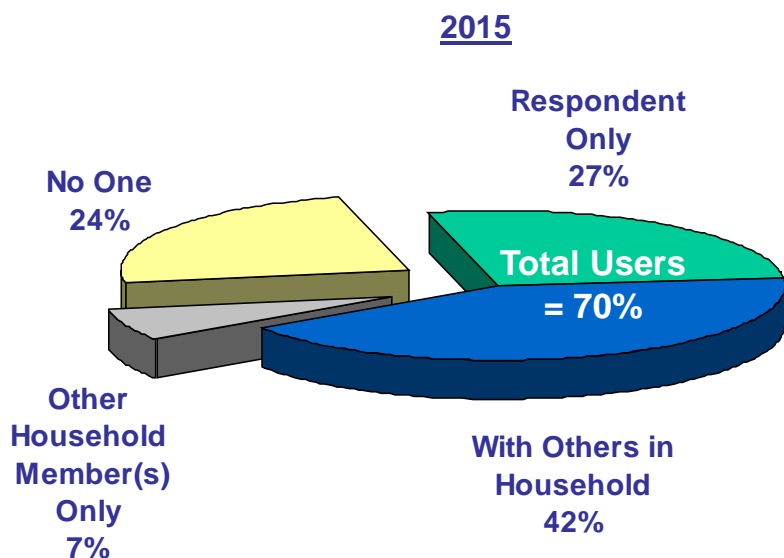
- Many of the more traditional reasons for using libraries were less often cited versus five years ago, with only the library's wireless network generating more traffic. Given that this was a multiple mention question, it may be that today's library users are becoming more selective in determining which library services they choose to use.

Total Household (2015)

Reason	2015	2010	2005	2000	Total Household (2015)
Borrow books, CDs, DVDs or other materials	84%	90%	88%	88%	86%
Get information on a topic of personal interest	56%	70%	73%	77%	59%
Read or study	34%	41%	38%	47%	44%
Access the Internet using library computers	28%	33%	31%	19%	35%
Relax or socialize	26%	26%			31%
Use the library's wireless network	25%	17%			31%
Access databases / other electronically stored info*	23%	33%	32%	32%	27%
Take a child to a program or activity	23%	23%	18%	17%	25%
Attend a lecture, program, meeting or training session	16%	13%	9%	9%	18%
Work assignment or keep up-to-date at work	14%	21%	21%	24%	21%
School or class assignment	10%	16%	16%	18%	27%

Legend: 2015, 2010, 2005, 2000

Q.6a/b

Base: Those who personally visited the public library (2000 - 678; 2005 - 713; 2010 - 723; 2015 - 394); households where anyone used the public library (2010 - 843; 2015 - 444). *Wording changed in 2015 from "Access electronic databases."

Market Probe

15

- In 2015, more frequent visits to the library were associated with borrowing materials, gathering information on topics of interest, Internet/wireless/database access, and participation in library programs.

Reason	More than 10 past year in-person visits	1 to 10 past year in-person visits
Borrow books, CDs, DVDs or other materials	93%	78%
Get information on a topic of personal interest	65%	50%
Read or study	37%	33%
Access the Internet using library computers	35%	24%
Relax or socialize	31%	22%
Use the library's wireless network	31%	21%
Access databases / other electronically stored info	29%	18%
Take a child to a program or activity	26%	21%
Attend a lecture, program, meeting or training session	21%	13%
School or class assignment	7%	12%
Work assignment or keep up-to-date at work	14%	15%

Legend:
- More than 10 past year in-person visits
- 1 to 10 past year in-person visits

Q.6a
Base: Frequent library users (2015 - 161); infrequent users (2015 - 233).

Market Probe

16

Federation of ONTARIO PUBLIC LIBRARIES

- Availability of information from other sources has become the primary reason for not using the public library, with Internet and bookstore usage strongly linked to this explanation.

- Those with higher education and higher incomes are also more apt to offer this rationale for non-use.

Get information from other sources
- 50% (2015)
- 40% (2010)
- 21% (2005)
- 22% (2000)

Not interested
- 30% (2015)
- 34% (2010)
- 25% (2005)
- 30% (2000)

Too busy
- 21% (2015)
- 27% (2010)
- 26% (2005)
- 21% (2000)

Don't read
- 8% (2015)
- 9% (2010)
- 7% (2005)
- 12% (2000)

Library isn't accessible
- 7% (2015)
- 10% (2010)
- 3% (2005)
- 8% (2000)

Use library at school or work
- 6% (2015)
- 6% (2010)
- 6% (2005)
- 6% (2000)

Legend: ■ 2015 □ 2010 ■ 2005 □ 2000

Due to illness / injury / too old
- 6% (2015)
- 4% (2010)
- 5% (2005)
- 2% (2000)

No reason / don't know
- 5% (2015)
- 1% (2010)
- 7% (2005)
- 6% (2000)

Prefer to buy / share books
- 3% (2015)
- 11% (2010)
- 4% (2005)
- 7% (2000)

Library hours not convenient
- 3% (2015)
- 4% (2010)
- 2% (2005)
- 2% (2000)

Have own library / books
- 4% (2015)
- 1% (2010)

Category		%
Have Internet Access		
	Yes	**57%**
	No	26%
Bookstore Use		
	None	25%
	Any	**58%**
Books Read in Past Year		
	None	38%
	1-5	52%
	6-15	**66%**
	16+	56%
Education		
	High school	33%
	Univ/college	**62%**
	Grad school	**56%**
Income		
	<$35K	39%
	$35K - <$75K	43%
	$75K+	**65%**
Community Size		
	<30K	40%
	35K - <500K	41%
	500K+	**62%**

Q.9a/b
Base: Past-year public library non-users (2000 - 326; 2005 - 389; 2010 - 343; 2015 - 183).
Note: Mentions of 3% or more only. May total more than 100%, due to multiple mentions.

- Over 90% of those who haven't used the public library in the past year have done so sometime in the past.

- Relatively few Ontarians who have ever used the public library claim to have had a negative experience when doing so. For the few who did, fines, materials not being available, and unhelpful staff were the main complaints.

Ever used the public library

■ Yes (%)
■ No (%)

9%   91%
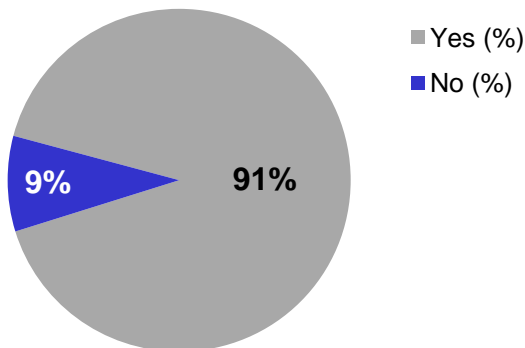
Bookstore Use
None	81%
Any	**94%**

Gender
Male	86%
Female	**96%**

Had a negative experience

■ Yes (%)
■ No (%)

95%   5%
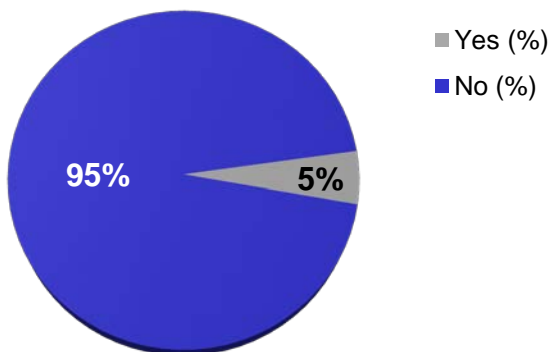
Type of Negative Experience

Materials / books not available	16%
I owe penalty fees	16%
Staff aren't friendly / helpful	13%
It's overcrowded	9%
Have to pay access fee to services	6%
Not enough computers	6%
Difficulties with computers / forgot pin #	6%
Poor hours	3%
Materials / books are damaged / ripped	3%
Other	16%

Q.9d/e/f
Base: Past-year non-users of library (191); All users of library (586); Had a negative library experience (32). New questions in 2015.

Market Probe

- Hard copy books remain the most popular format.
- Those who prefer E-books are more likely to be bookstore users and to have not visited the public library in person in the past year.

2015

Mostly in electronic format	11%
Mostly in hard copy	74%
Both equally	14%

0%   20%   40%   60%   80%   100%
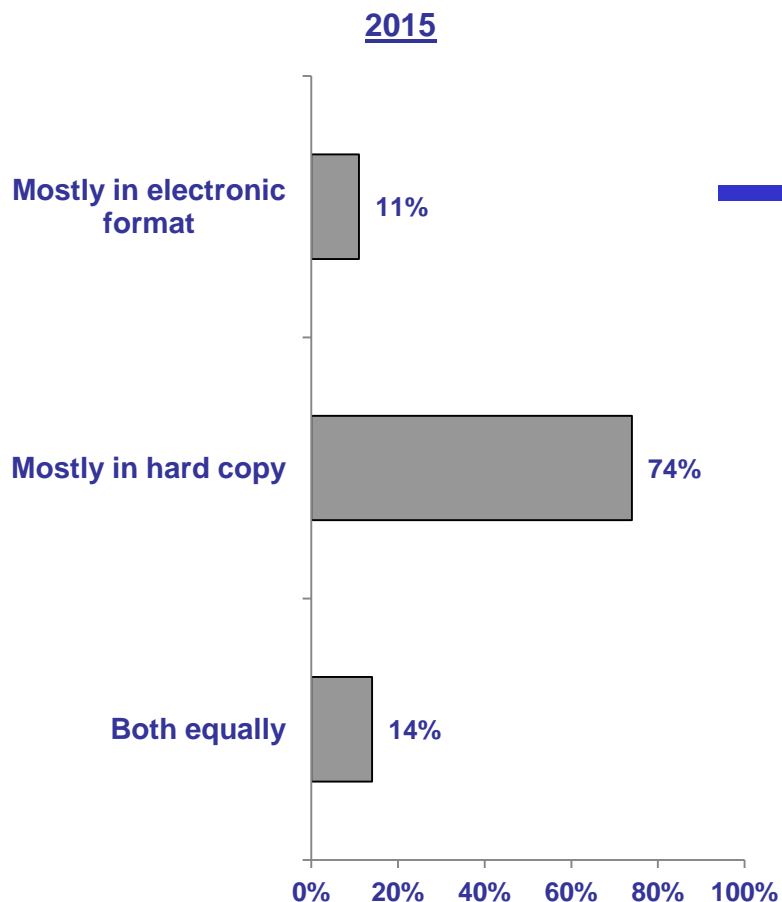
In-Person Library Use
| **None** | **20%** |
| Any | 8% |

Library vs Bookstore Usage
More	8%
Same	8%
Less	**16%**

Bookstore Use
| None | 5% |
| **Any** | **12%** |

Age
18-24	**10%**
25-34	6%
35-54	**11%**
55+	**13%**

Education
High school	9%
Univ/college	10%
Grad school	**21%**

Region
North	13%
East	11%
Southwest	7%
Metro T.O.	12%
GTA Urban	**16%**
GTA Ex-urban	5%

Q.13g
Base: Read any books in the past year (2015 - 507). New question in 2015.

Market Probe   19

Federation of ONTARIO PUBLIC LIBRARIES

- At the present time, equal numbers of Ontarians think libraries will become more important and less important as online availability of materials increases, with the largest group predicting that there will be no change.

- Those who think the library will become more important tend to be either older or younger, have lower incomes, and live in Metro Toronto.

More important
- 26% (2015)
- 23% (2010)
- 27% (2005)
- 27% (2000)

No change
- 43% (2015)
- 44% (2010)
- 45% (2005)
- 41% (2000)

Less important
- 27% (2015)
- 29% (2010)
- 23% (2005)
- 25% (2000)

Don't know
- 5% (2015)
- 4% (2010)
- 6% (2005)
- 7% (2000)

Legend: 2015, 2010, 2005, 2000

Cardholder	
Yes	**26%**
No	23%

In-Person Library Use	
None	17%
1-10 times	**27%**
11+ times	**36%**

Access Library by Phone / Text	
Yes	**38%**
No	22%

Access Library by Internet	
Yes	**32%**
No	21%

Bookstore Use	
None	25%
1-10 times	23%
11+ times	**33%**

Library vs. Bookstore Usage	
More	**32%**
Same	28%
Less	19%

Library Benefits	
Top	**40%**
Middle	**20%**
Bottom	5%

Age	
18-24	**30%**
25-34	21%
35-54	21%
55+	**32%**

Income	
<$35K	**40%**
$35K - <$75K	21%
$75K+	26%

Community Size	
<30K	24%
30K - <500K	21%
500K+	**30%**

Region	
North	18%
East	28%
Southwest	22%
Metro T.O.	**40%**
GTA Urban	20%
GTA Ex-urban	27%

Q.15
Base: All respondents (2000 - 1007; 2005 - 1102; 2010 - 1100; 2015 - 600).

Market Probe   **20**

Federation of ONTARIO PUBLIC LIBRARIES

- When asked theoretically about their local library closing, a large majority of respondents said that they would expect there to be a major impact on their community.

- People in Southwest Ontario and those who use the library to access the Internet were among the groups most apt to feel this way, while young people tended to downplay the severity of the impact.

2015

Major Impact	71%
Minor Impact	21%
No Impact at all	2%

0%   20%   40%   60%   80%   100%
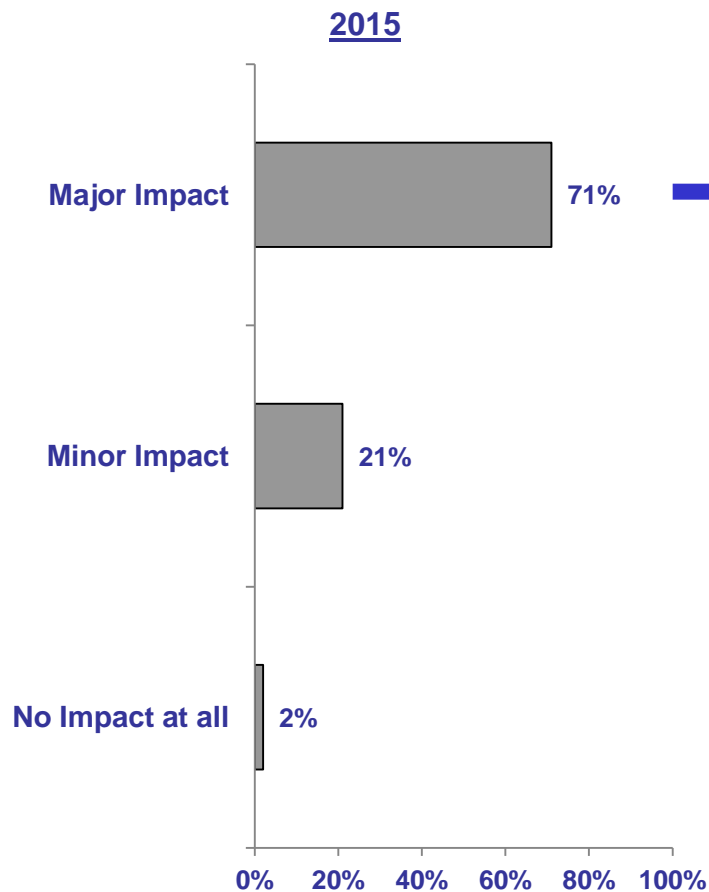
Cardholder		Bookstore Use	
Yes	**77%**	None	66%
No	54%	1-10 times	69%
		11+ times	**78%**
In-Person Library Use			
None	54%	Age	
1-10 times	**75%**	18-24	56%
11+ times	**86%**	**25-34**	**73%**
		35-54	**69%**
Access Library by Phone / Text		**55+**	**77%**
Yes	**88%**		
No	66%	Region	
		North	60%
Have Internet Access		East	66%
None	73%	**Southwest**	**78%**
Work	68%	Metro T.O.	72%
Home	71%	GTA Urban	72%
School	69%	GTA Ex-urban	72%
Library	**78%**		
Other	69%		
Access Library by Internet			
Yes	**82%**		
No	63%		
Social Media Interaction with Library			
Yes	**86%**		
No	70%		

Q.16a-a
Base: All respondents (2015 - 600). New question in 2015.

- There has been virtually no change over the past five years in how Ontarians view the library relative to other unspecified tax-supported services, with over three times as many respondents still saying the library belongs at the top rather than the bottom of the list.

- The groups most likely to place the library at the top of the list include older residents, people without Internet access, lower income earners, immigrants and Torontonians.

Top of list
- 36%
- 37%
- 25%
- 22%

Middle of list
- 50%
- 49%
- 56%
- 55%

Bottom of list
- 11%
- 11%
- 16%
- 20%

Don't know
- 3%
- 3%
- 4%
- 3%

Legend:
- 2015
- 2010
- 2005
- 2000

0%   20%   40%   60%   80%   100%
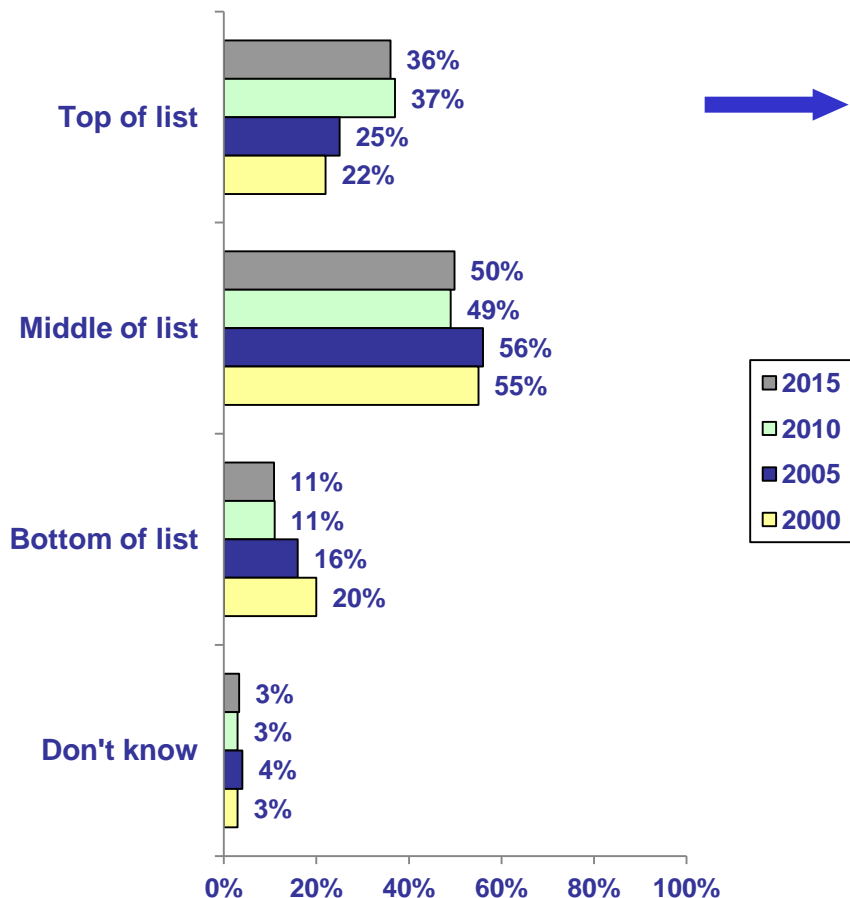
Cardholder
Yes	**42%**
No	22%

In-Person Library Use
None	21%
1-10 times	**34%**
11+ times	**57%**

Books Read in Past Year
None	26%
1-5	26%
6-15	31%
16+	**48%**

Library vs Bookstore Usage
More	**54%**
Same	**36%**
Less	23%

Access Library by Phone / Text
Yes	**58%**
No	29%

Have Internet Access
None	**48%**
Any	34%

Access Library by Internet
Yes	**46%**
No	29%

Future Importance of Libraries
More	**55%**
Same	**34%**
Less	20%

Age
18-24	27%
25-34	31%
35-54	**38%**
55+	**40%**

Income
<$35K	**47%**
$35K - <$75K	41%
$75K+	33%

Born in Canada
Yes	34%
No	**45%**

Region
North	31%
East	34%
Southwest	39%
Metro T.O.	**47%**
GTA Urban	31%
GTA Ex-urban	34%

Q.16
Base: All respondents (2000 - 1007; 2005 - 1102; 2010 - 1100; 2015 - 600).

- In 2015, being a lender of materials is still the role of the library that is most valued by Ontarians, followed by early literacy programs, which is now much more valued than it was five years ago.

- Several other services have also registered a significant increase in their perceived value but remain in the bottom half of the list.

Bottom 6 Ratings
(1-6 on a 10-pt. scale)

Top 2 Ratings
(9-10 on a 10-pt. scale)

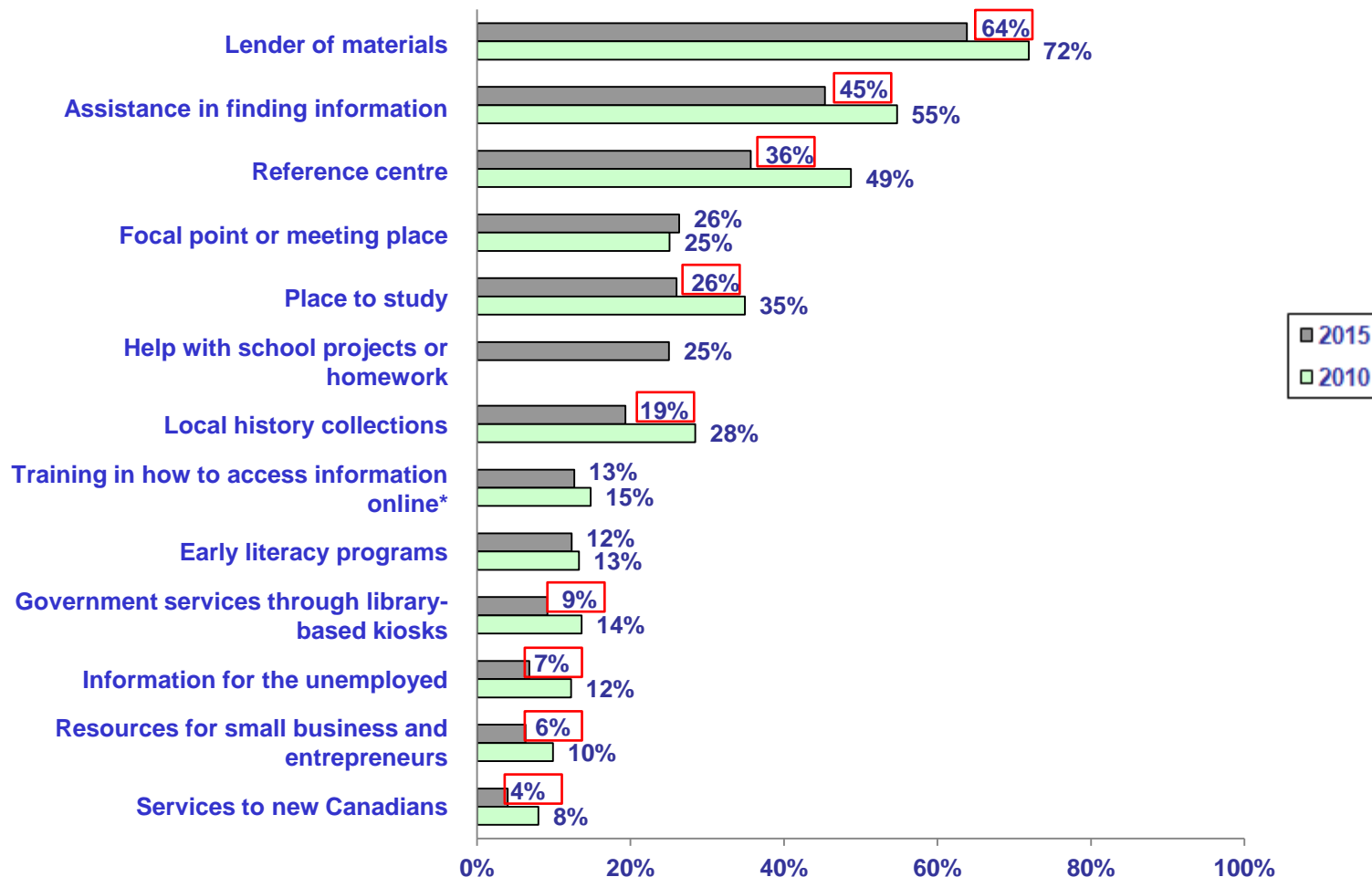| Service	2015 (Bottom 6)	2010 (Bottom 6)	2015 (Top 2)	2010 (Top 2)
Lender of materials	9	9	68	69
Early literacy programs	13	22	60	46
Reference centre	15	13	56	55
Provider of support for school projects or homework	14		54	
Place to study	17	21	50	45
Local history collections	20	22	45	42
Assistance in finding information	18	16	45	47
Services to new Canadians	26	35	40	27
Information for the unemployed	31	33	37	30
Trainer in how to access info online*	33	39	31	24
Focal point or meeting place	35	44	31	22
Government services through library-based kiosks	39	39	28	25
Resources for small business and entrepreneurs	45	46	21	18

Legend: ■ 2015 □ 2010

Q.17
Base: All respondents (2010 - 1100; 2015 - 600).
*Wording changed in 2015 from "Trainer in how to access information through computers".

Market Probe 23

- After being asked to rate the value of the services the library offers, respondents were then asked to indicate which of the services had been used by someone in their household during the past year. Despite the higher value perceptions measured in this year's study, actual usage of most of the services has declined noticeably.

Legend: ■ 2015 ■ 2010

| Service	2015	2010
Lender of materials	64%	72%
Assistance in finding information	45%	55%
Reference centre	36%	49%
Focal point or meeting place	26%	25%
Place to study	26%	35%
Help with school projects or homework	25%	
Local history collections	19%	28%
Training in how to access information online*	13%	15%
Early literacy programs	12%	13%
Government services through library-based kiosks	9%	14%
Information for the unemployed	7%	12%
Resources for small business and entrepreneurs	6%	10%
Services to new Canadians	4%	8%

Q.18
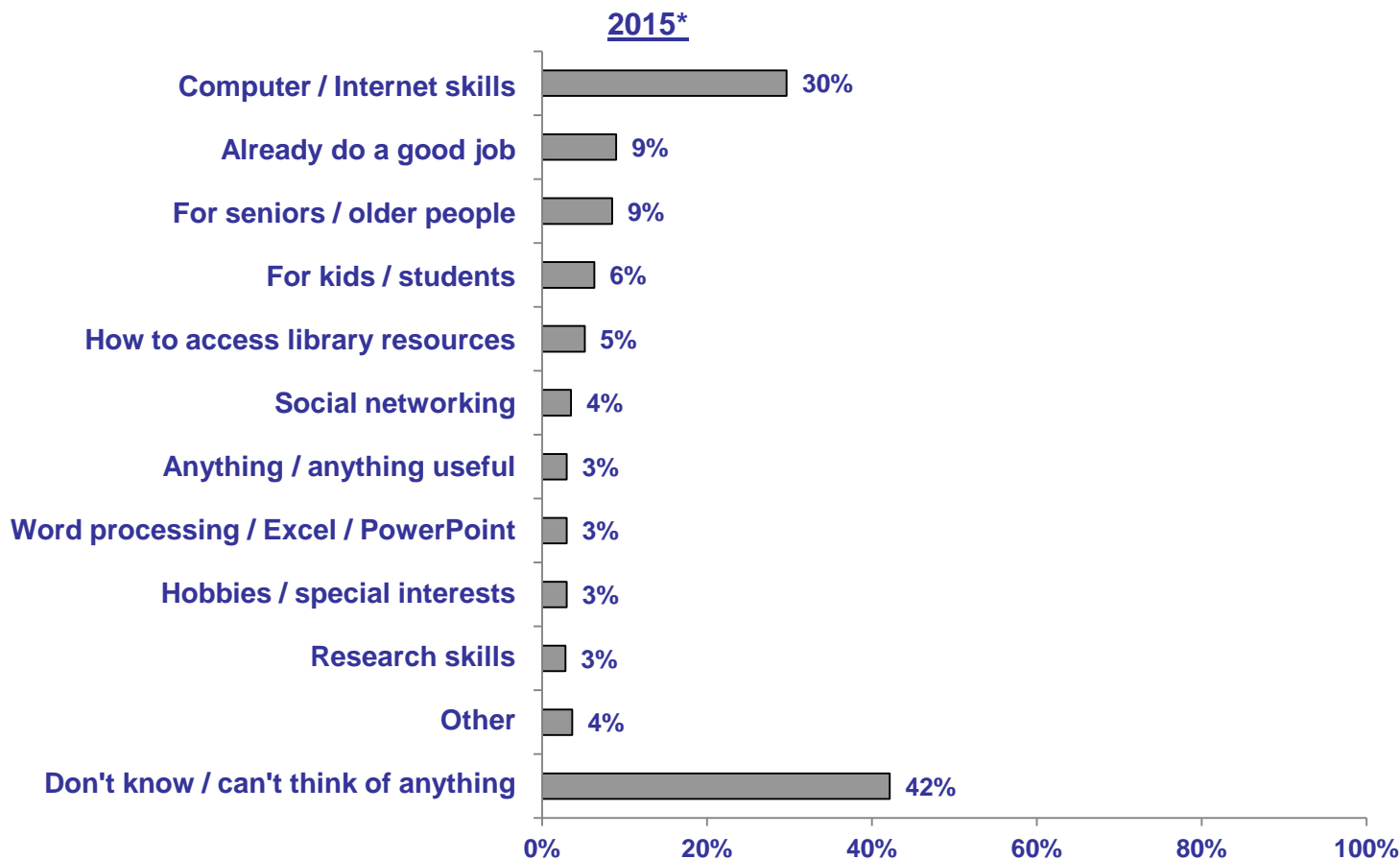Base: All respondents (2010 - 1100; 2015 - 600).
*Wording change in 2015 from "Training in how to access information through computers".

- For each of the library services, the diagram below plots perceived value (percent giving the service a score of 9 or 10 on the 10-point value scale) along with reported usage.

- Value perceptions and reported usage are most aligned for being a lender of materials, providing assistance in finding information, and serving as a focal point or meeting place.

- The widest value/usage gap is for early literacy programs, which was also the case in 2010.

Q.17/18
Base: All respondents (2015 - 600).
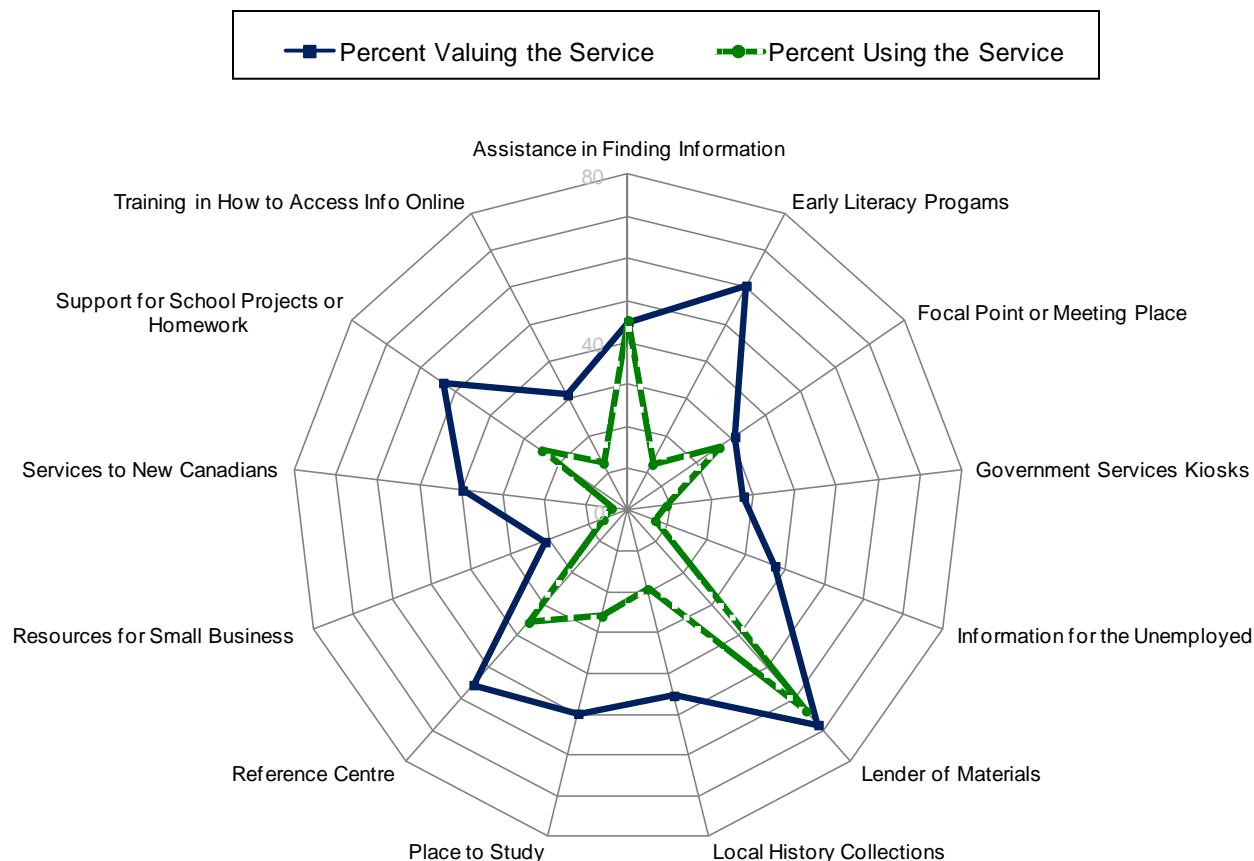
- Responses to an open-ended question in 2015 reveal that nearly one-third of Ontario adults think the public library should offer general computer or Internet skills training. Others, in response to this question, identified who they thought the most appropriate target audiences for IT training would be.

- A substantial number of respondents provided no suggestions regarding the type of technical training the library could provide.

2015*

|	
Computer / Internet skills	30%
Already do a good job	9%
For seniors / older people	9%
For kids / students	6%
How to access library resources	5%
Social networking	4%
Anything / anything useful	3%
Word processing / Excel / PowerPoint	3%
Hobbies / special interests	3%
Research skills	3%
Other	4%
Don't know / can't think of anything	42%

0%   20%   40%   60%   80%   100%

Q.13b
Base: All respondents (2015 - 600).
*Change of question wording in 2015 makes comparisons to earlier data invalid.
Note: Table contains mentions of 3% or more. May total more than 100%, due to multiple mentions.

Market Probe

- Compared to 2010, there is stronger agreement that the public library is the only affordable place where the average Ontarian can go for information and less disagreement that the public library is the best place for people of all ages to go to pursue lifelong learning.
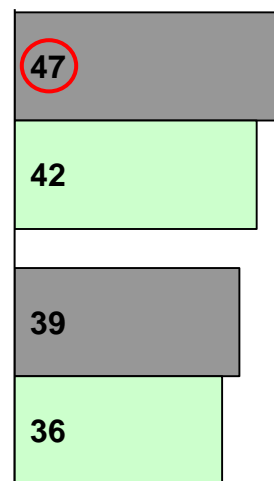
Bottom 6 Ratings
(1-6 on a 10-pt. scale)
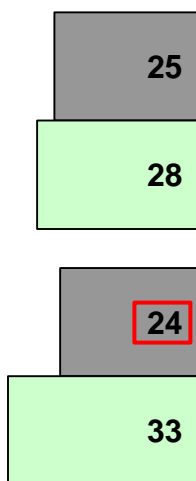
Top 2 Ratings
(9-10 on a 10-pt. scale)

The public library is the only affordable place where the average Ontarian can go for information

25
28

47
42

Legend: 2015, 2010

The public library is the best place for people of all ages to go to pursue lifelong learning

24
33

39
36

- Similar percentages of library non-users from the telephone and web surveys said they had ever used the public library, but the proportion of all past and current users who had a negative experience was twice as high for the online group.

- For web survey takers, the most common complaint had to do with unfriendly or unhelpful library staff.

Ever used the public library

Yes (%)
No (%)

11% 89%

Had a negative experience

Yes (%)
No (%)

90% 10%
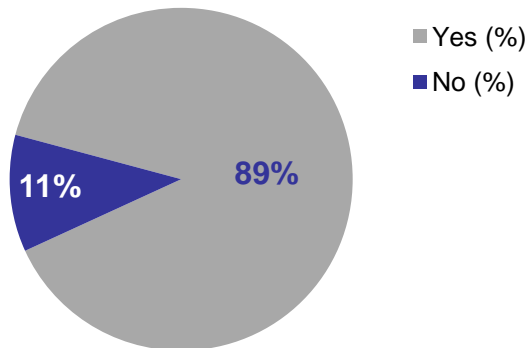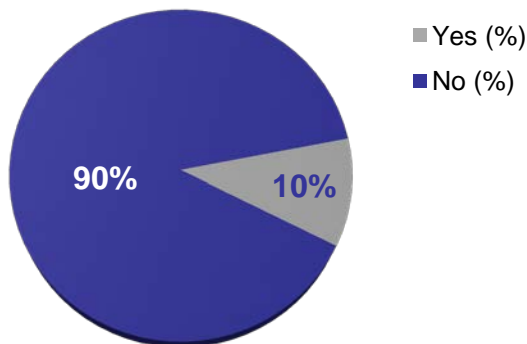
Books Read in Past Year

None	85%
1-5	**95%**
6-15	89%
16+	89%

In-Person Bookstore Use

None	80%
1-10 times	**95%**
11+ times	**89%**

Library Benefits

Top	88%
Middle	**93%**
Bottom	82%

Children in Home

Yes	**97%**
No	88%

Income

<$35K	73%
$35K - <$75K	88%
$75K+	**96%**

Born in Canada

Yes	**92%**
No	78%

### Type of Negative Experience

Staff aren't friendly / helpful	21%
Materials / books not available	14%
It's noisy / people are disruptive	14%
Terrible return system / books returned but still fined late fees	13%
Difficulties with computers / forgot pin #	6%
Materials / books are damaged / ripped	6%
Poor security	4%
Difficulty getting card	3%
I owe penalty fees	2%
It's overcrowded	2%
Fine / fees are too high	2%
Rooms aren't available	2%
Other	12%

Q.9d/e/f
Base: Past-year non-users of library (298); All users of library (1070); Had a negative library experience (112).

Federation of ONTARIO PUBLIC LIBRARIES

- Web panelists tended to read fewer books in the past year than those who responded to the survey by phone, but the proportion of non-readers was consistent across the two populations.

- Women and those over the age of 55 are among the heaviest readers of books.

Any Books Read — 86%

16+ books read — 27%

6 to 15 books read — 28%

1 to 5 books read — 31%

0% 20% 40% 60% 80% 100%

Cardholder
Yes	**31%**
No	17%

In-Person Library Use
None	15%
1-10 times	22%
11+ times	**56%**

In-Person Bookstore Use
None	13%
1-10 times	25%
11+ times	**58%**

Online Book Vendor Use
None	18%
1-10 times	25%
11+ times	**53%**

Access Library by Phone / Text
Yes	**36%**
No	24%

Have Internet Access
Work	25%
Home	27%
School	22%
Library	**32%**
Other	26%

Access Library by Internet
Yes	**36%**
No	15%

Library Benefits -u
Top	**38%**
Middle	23%
Bottom	11%

Gender
Male	20%
Female	**33%**

Age
18-24	18%
25-34	18%
35-54	22%
55+	**38%**

Education
High school	24%
Univ/college	24%
Grad school	**38%**

Born in Canada
Yes	**28%**
No	22%

Language
English	**27%**
French	**32%**
Other	7%

Region
North	28%
East	**31%**
Southwest	**31%**
Metro T.O.	27%
GTA Urban	20%
GTA Ex-urban	**30%**

Federation of ONTARIO PUBLIC LIBRARIES

- Those who completed the online survey were somewhat more inclined to read books in electronic format than those who completed the phone survey.

- E-book usage was more common in Metro Toronto and urban portions of the GTA.

Mostly in electronic format — 17%

Mostly in hard copy — 66%

Both equally — 18%

0% 20% 40% 60% 80% 100%
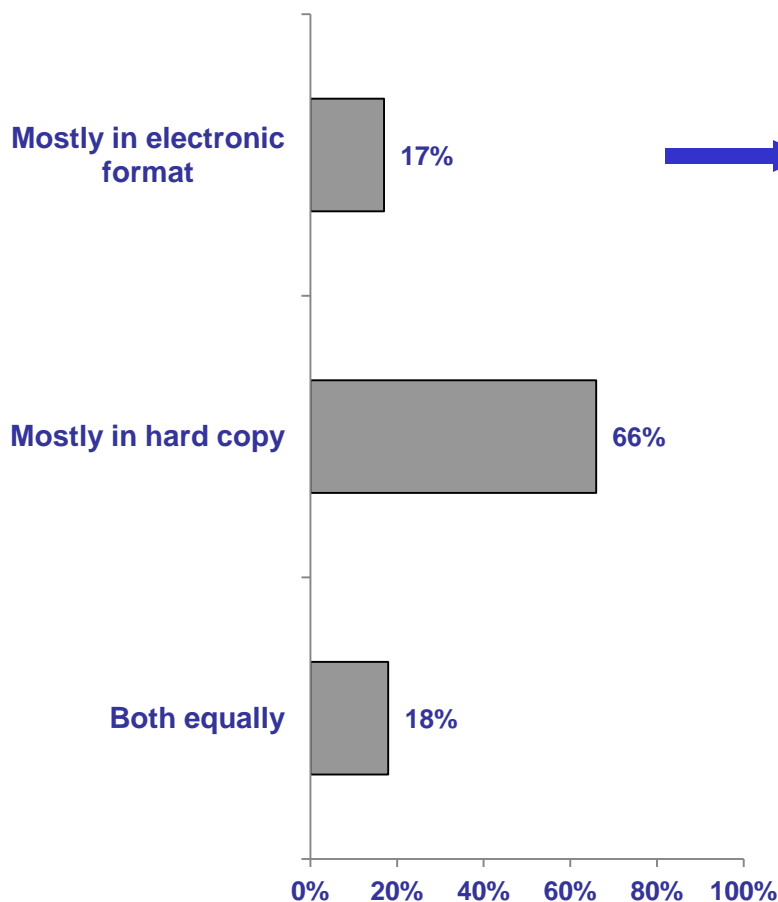
In-Person Library Use
None	**24%**
1-10 times	15%
11+ times	13%

In-Person Bookstore Use
None	**24%**
1-10 times	16%
11+ times	11%

Online Book Vendor Use
None	11%
1-10 times	**18%**
11+ times	**21%**

Language
English	**17%**
French	8%
Other	**22%**

Region
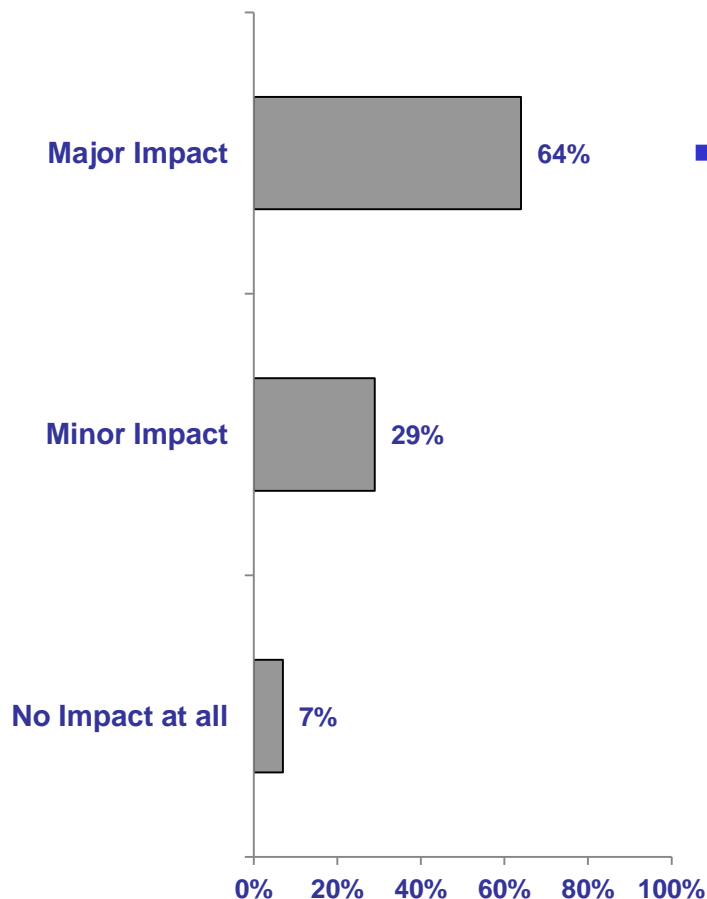|	
North	12%
East	12%
Southwest	16%
Metro T.O.	**21%**
GTA Urban	**19%**
GTA Ex-urban	12%

- Relatively few of those who use the library to access electronic materials said they were familiar with the different electronic channels or services some libraries offer.

- Zinio and Hoopla were most familiar to online library users, with the latter being accessed more through the library than elsewhere.

Familiar with Channel	**Accessed via Library Account**	**Accessed Elsewhere**

Familiar with Channel

Channel	%	Accessed via Library Account	Accessed Elsewhere
Zinio	27%	7%	9%
Hoopla	22%	9%	2%
AskON	15%	3%	3%
Indieflix	13%	1%	2%
Freegal	13%	4%	2%

0% 20% 40% 60% 80% 100%
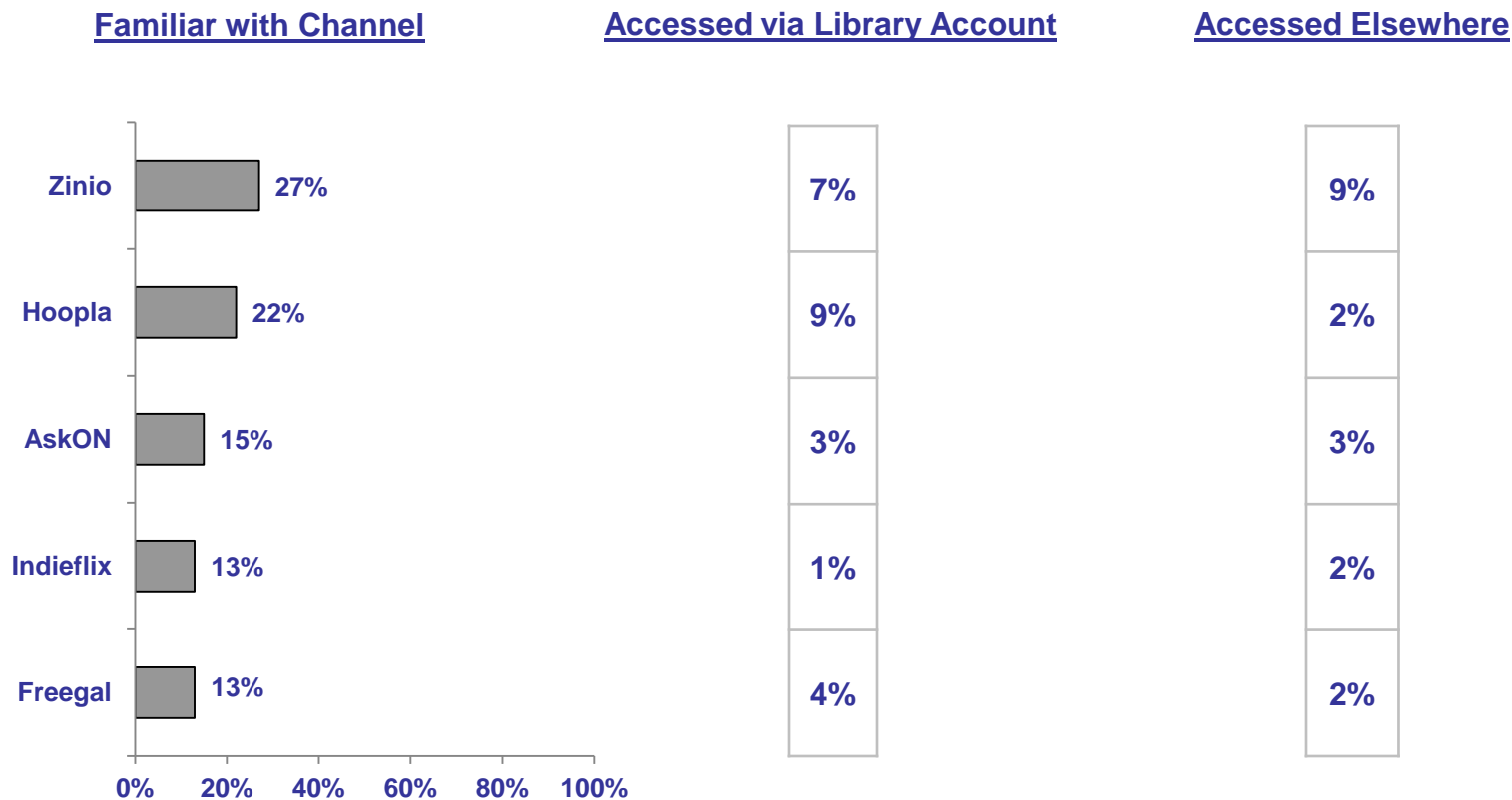
Q.8f
Base: Those who checked the library's online catalogue, downloaded an item, or accessed other electronic materials on the library's web page (449).

Market Probe

31

- Web panelists were not quite as concerned as telephone survey respondents about the impact a potential library closing would have on their community; still almost two-thirds thought that the impact would be major.

- Those predicting the biggest impact were located in certain areas, namely Northern Ontario, Southwest Ontario and non-urban parts of the GTA.


Major Impact — 64%

Minor Impact — 29%

No Impact at all — 7%

0%   20%   40%   60%   80%   100%

Cardholder
Yes	**71%**
No	50%

In-Person Library Use
None	46%
1-10 times	**67%**
11+ times	**86%**

Books Read in Past Year
None	36%
1-5	57%
6-15	**74%**
16+	**76%**

In-Person Bookstore Use
None	51%
1-10 times	**66%**
11+ times	**76%**

Have Internet Access
Work	64%
Home	65%
School	59%
Library	**77%**
Other	68%

Access Library by Internet
Yes	**73%**
No	53%

Access Library by Phone / Text
Yes	**74%**
No	62%

Library Benefits
Top	**85%**
Middle	59%
Bottom	29%

Gender
Male	60%
Female	**68%**

Age
18-24	51%
25-34	62%
35-54	62%
55+	**72%**

Children in Home
Yes	**70%**
No	62%

Education
High school	63%
Univ/college	62%
Grad school	**73%**

Community Size
<30K	**75%**
30K - <500K	**70%**
500K+	60%

Region
North	**76%**
East	58%
Southwest	**72%**
Metro T.O.	63%
GTA Urban	60%
GTA Ex-urban	**75%**

Q.16a-b
Base: All respondents (1102).

Market Probe

- Where respondents placed the benefits the library delivers relative to other tax-supported services was very similar for the two populations surveyed.

- Consistent with the findings from the telephone survey, people under the age of 35 were less likely to appreciate the benefits of the public library compared to other municipal services.

Top of list	33%
Middle of list	56%
Bottom of list	11%
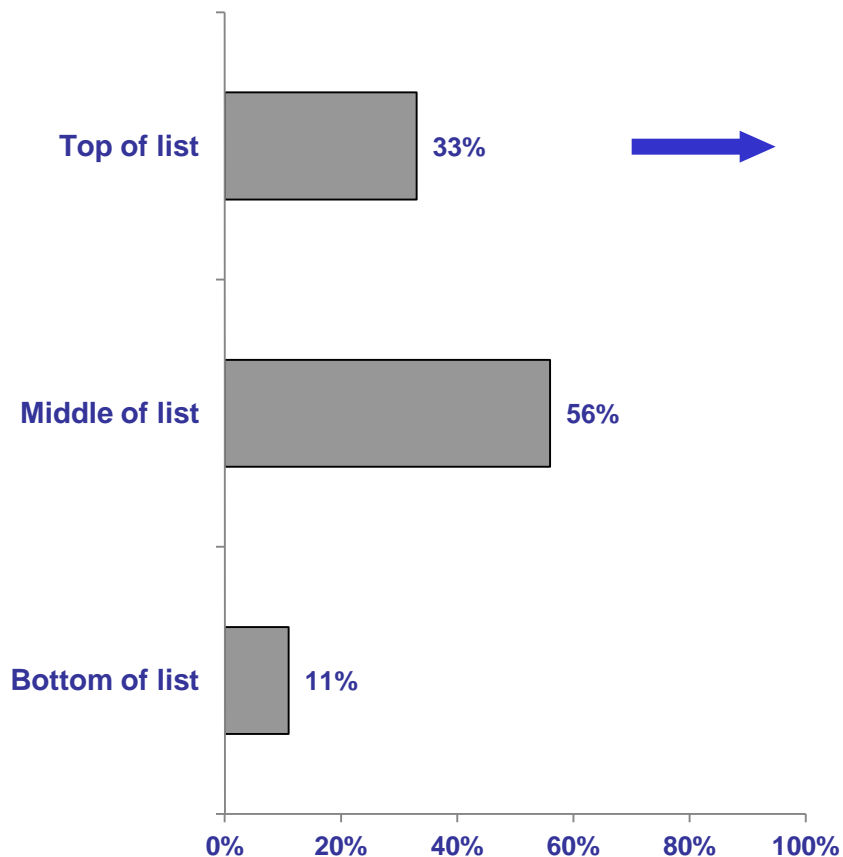
Cardholder
| **Yes** | **40%** |
| No | 15% |

In-Person Library Use
None	15%
1-10 times	31%
11+ times	**64%**

Books Read in Past Year
None	19%
1-5	23%
6 -15	**36%**
16+	**47%**

In-Person Bookstore Use
None	29%
1-10 times	32%
11+ times	**40%**

Access Library by Phone / Text
| **Yes** | **47%** |
| No | 29% |

Have Internet Access
Work	30%
Home	33%
School	23%
Library	**46%**
Other	32%

Access Library by Internet
| **Yes** | **43%** |
| No | 19% |

Age
18-24	22%
25-34	26%
35-54	**34%**
55+	**38%**

Education
High school	35%
Univ/college	30%
Grad school	**43%**

Q.16
Base: All respondents (1102).

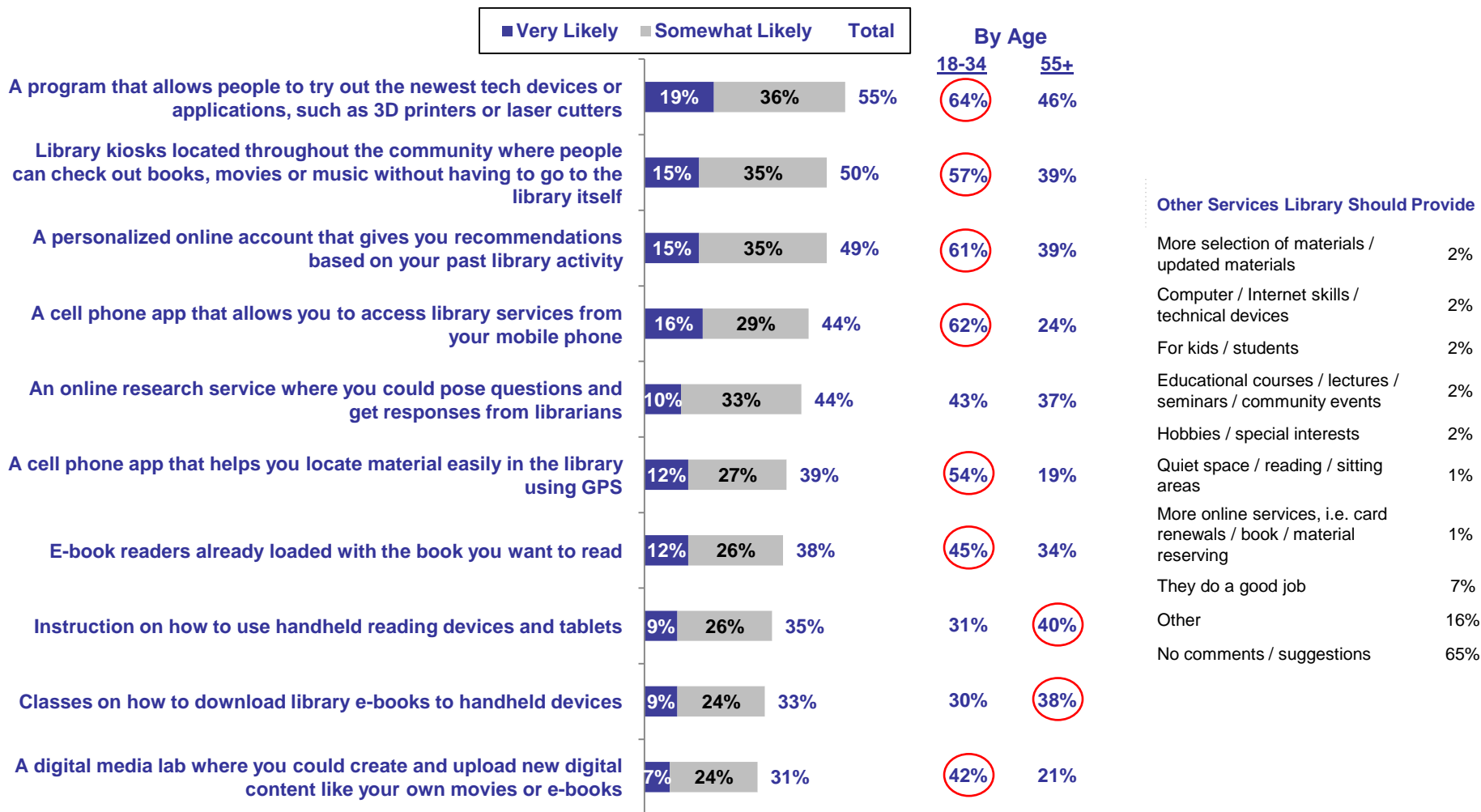Federation of ONTARIO PUBLIC LIBRARIES

- Except for a couple of items near the bottom of the list, web panelists did not value the different services the library provides as highly as phone survey respondents did.

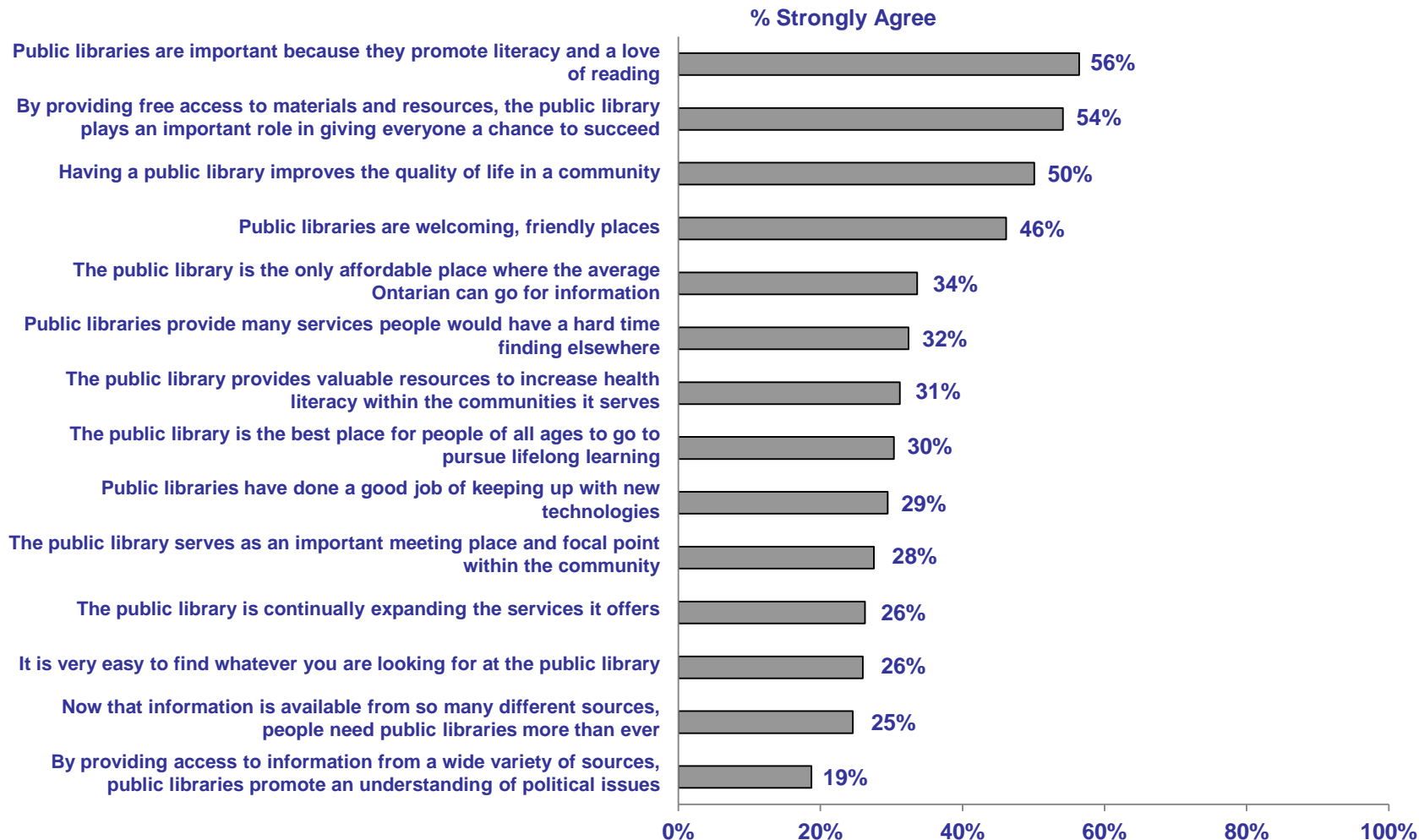- The biggest difference of opinion between the two groups was with respect to early literacy programs.

Bottom 6 Ratings (1-6 on a 10-pt. scale)		Top 2 Ratings (9-10 on a 10-pt. scale)
21	Lender of materials	53
27	Provider of support for school projects or homework	41
26	Reference centre	40
27	Place to study	40
30	Early literacy programs	39
33	Local history collections	37
29	Assistance in finding information	35
40	Services to new Canadians	30
38	Information for the unemployed	28
45	Government services through library-based kiosks	26
43	Trainer in how to access info online	23
45	Focal point or meeting place	22
47	Resources for small business and entrepreneurs	21

Q.17
Base: All respondents (1102).

Market Probe

34

Federation of ONTARIO PUBLIC LIBRARIES

- Online survey participants were asked their likelihood of using some new services libraries are either offering or thinking of offering in the future. Interest in these concepts varied, in many cases based on age.

- There were very few suggestions made for other services over and above those shown.

	■ Very Likely	■ Somewhat Likely	Total	By Age 18-34	By Age 55+
A program that allows people to try out the newest tech devices or applications, such as 3D printers or laser cutters	19%	36%	55%	(64%)	46%
Library kiosks located throughout the community where people can check out books, movies or music without having to go to the library itself	15%	35%	50%	(57%)	39%
A personalized online account that gives you recommendations based on your past library activity	15%	35%	49%	(61%)	39%
A cell phone app that allows you to access library services from your mobile phone	16%	29%	44%	(62%)	24%
An online research service where you could pose questions and get responses from librarians	10%	33%	44%	43%	37%
A cell phone app that helps you locate material easily in the library using GPS	12%	27%	39%	(54%)	19%
E-book readers already loaded with the book you want to read	12%	26%	38%	(45%)	34%
Instruction on how to use handheld reading devices and tablets	9%	26%	35%	31%	(40%)
Classes on how to download library e-books to handheld devices	9%	24%	33%	30%	(38%)
A digital media lab where you could create and upload new digital content like your own movies or e-books	7%	24%	31%	(42%)	21%

Other Services Library Should Provide

More selection of materials / updated materials	2%
Computer / Internet skills / technical devices	2%
For kids / students	2%
Educational courses / lectures / seminars / community events	2%
Hobbies / special interests	2%
Quiet space / reading / sitting areas	1%
More online services, i.e. card renewals / book / material reserving	1%
They do a good job	7%
Other	16%
No comments / suggestions	65%

Q.13c/d
Base: All respondents (1102).

Market Probe

SEPTEMBER 9, 2016

Libraries 2016

Trends in visiting public libraries have steadied, and many Americans have high expectations for what their local libraries should offer

BY *John B. Horrigan*

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Libraries 2016

Trends in visiting public libraries have steadied, and many Americans have high expectations for what their local libraries should offer

Most Americans view public libraries as important parts of their communities, with a majority reporting that libraries have the resources they need and play at least some role in helping them decide what information they can trust. When asked to think about the things that libraries could do in the future, notable numbers of Americans respond in a way that can be boiled down to one phrase: "Yes, please."

Public libraries, many Americans say, should offer programs to teach people digital skills (80% think libraries should definitely do this) and help patrons learn how to use new creative technologies like 3-D printers (50%). At the same time, 57%

Large majority says that libraries should have programs to teach digital skills; many hope they provide comfortable reading and working spaces

% of U.S. adults ages 16 and older who say libraries should definitely or maybe ...

Offer programs to teach people, including kids & senior citizens, how to use digital tools such as computers, smartphones & apps — Definitely 80, Maybe 16

Have more comfortable spaces for reading, working and relaxing — Definitely 57, Maybe 30

Buy 3-D printers and other digital tools to allow people to learn how to use them to make different kinds of objects — Definitely 50, Maybe 37

Move some print books & stacks OUT OF public locations to free up more space for things such as tech centers, reading rooms, meetings rooms & cultural events — Definitely 24, Maybe 40

Source: Survey conducted March 7-April 4, 2016.
"Libraries 2016"

PEW RESEARCH CENTER

of Americans say libraries should definitely offer more comfortable places for reading, working and relaxing.

Yet, Americans are also divided on a fundamental question about how books should be treated at libraries: 24% support the idea of moving books and stacks in order to make way for more community- and tech-oriented spaces, while 31% say libraries should not move the books to create such spaces. About four-in-ten think libraries should maybe consider doing so.

A Pew Research Center telephone survey of 1,601 Americans ages 16 and older conducted from March 7 to April 4, 2016, finds that Americans continue to express largely positive views about the current state of their local public libraries. For instance, around three-quarters (77%) say that public libraries provide them with the resources they need. And 66% say the closing of their local public library would have a major impact on their community although notably, just 33% say this would have a major impact on them personally or on their family.

There is also a growing sense that libraries can help people decide what information they can trust: 37% of Americans feel that public libraries contribute "a lot" in this regard, a 13-point increase from a survey conducted at a similar point in 2015.

A majority of Americans feel libraries are doing a good job of providing a safe place for people to hang out or spend time (69% feel libraries contribute "a lot" to their communities in this regard) as well as opening up educational opportunities for people of all ages (58%). And roughly half think their libraries contribute "a lot" to their communities in terms of helping spark creativity among young people (49%) and providing a trusted place for people to learn about new technologies (47%).

In-person library usage fluctuates

% of U.S. adults ages 16 and older who used library services in the past 12 months

Visited public library / bookmobile in person

53   48   46   44   48

Visited library website

25   30   31   27

Nov '12   Sep '13   Apr '15   Nov '15   Apr '16
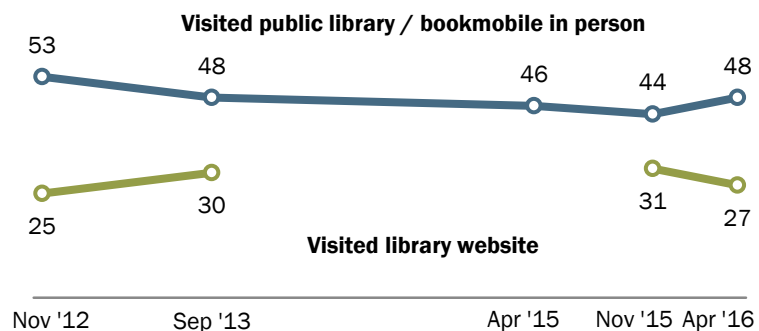
Note: No data specifically on website usage were gathered in April 2015.
Source: Survey conducted March 7-April 4, 2016.
"Libraries 2016"

PEW RESEARCH CENTER

As in past Pew Research Center surveys of library use, the April 2016 survey also measured Americans' usage of and engagement with libraries. Overall, 53% of Americans age 16 or older have had some interaction with a public library in the past year – either through an in-person visit, using a library website, or via a mobile app. Some 48% of adults specifically visited a library or bookmobile in the past 12 months, a modest uptick from the 44% who said that in late 2015. There was a four-point drop, though, in the number who visited library websites in the previous 12 months – falling from 31% who said they'd done so in 2015 to 27% in 2016.

What to do with the books at the library? The public is not settled on this

Last year, Pew Research Center reported a growth in public support for libraries moving some books and stacks out of the public spaces in libraries and instead creating meeting areas or technology spaces. Nearly one-third (30%) in 2015 said libraries should definitely move books out of public spaces in favor of using that space for other purposes, an increase from 20% in 2014. However, the 2016 survey recorded another shift, as the number of people age 16 and older who said this fell six points to 24%. Correspondingly, the share saying libraries should definitely not move books increased in 2016 to 31%, up from 25% last year.

The one figure that did not change, which reflects the tentativeness people may bring to thinking about this issue, is the share of people who say libraries *maybe* should move books and stacks from public places. A plurality (40%) said this in 2016, the same share who has said this since 2012.

There are a range of findings in the survey that might be surprising to those who are not deeply versed about events in and around libraries:

- Young adults are more likely to have visited a library in the past 12 months than those ages 65 and older: 53% of those ages 18 to 29 visited a library or bookmobile in person in the past year, compared with 40% of those 65 and older.

- 19% of American adults say they have never visited a public library, including 11% of those who have college or graduate degrees. This report profiles those who say they have never in their lives been to public libraries.

Americans do not yet have clearly fixed views about what to do with books and meeting spaces at libraries

% of U.S. adults ages 16 and older who say libraries should ____ ***move books and stacks out of public spaces*** *to free up more space for meeting and technology areas*
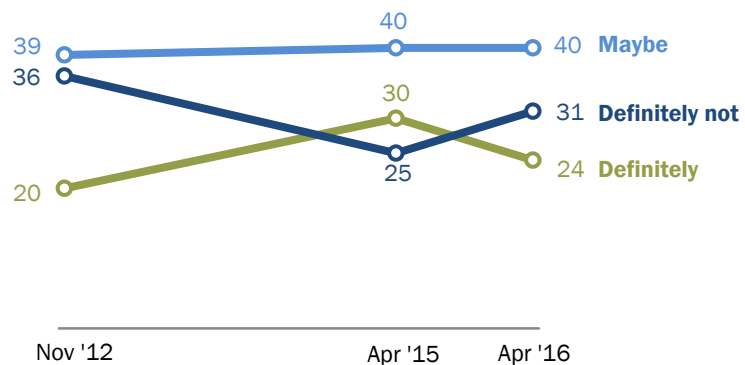
Source: Survey conducted March 7-April 4, 2016.
"Libraries 2016"

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- The act of borrowing printed books is still by far the most popular activity at libraries, even compared with using computers: 64% of library users ages 16 and older checked out a book in the last 12 months, compared with 29% who used a computer at the library in the same time frame.

- **An emerging library "service" is its Wi**-Fi connection, which can be used separately from the hours library buildings are open: 7% of those 16 and older say they have connected to a **library's Wi**-Fi system when the library building itself was closed.

- 44% of those 16 and older say their public libraries loan out e-books, while 10% say this is not true of their communities' libraries. Researchers at the University of Maryland report that 90% of libraries have e-book lending programs. So, many of Americans are not aware of this core service available at most local libraries.

- The idea that libraries serve communities at times of crisis is now pretty well established. Some 55% of those ages 16 and older say libraries contribute a lot (19%) or somewhat (37%) when a natural disaster or major problem strikes the community. There have been dramatic examples of libraries becoming refuges and outposts, for instance after Hurricane Sandy in the Northeast in 2013.

- The idea **of "outreach librarian" is taking hold: 7% of those 16 and older have been visited in** some way by a librarian in the past 12 months and another 4% have had that experience, but not in the past year.

1. Americans' attitudes toward public libraries

Libraries have been in flux since the dawn of the digital age. They face changes in the materials they provide, in use of their services, in the composition of their patron populations, and in demands for new services. It is a set of disruptions as far-reaching and disorienting as the changes that are occurring in the news media as the nature of news is redefined and its distribution mechanisms are revolutionized.

Pew Research Center has been tracking these changes through surveys, especially in library usage patterns, since 2011.

The 2016 survey shows that, within the context of evolving library usage patterns, public attitudes **are largely positive about the library's role in communities**. Many Americans are interested in libraries offering a range of services – including those that help people improve their digital skills and learn how to determine what information is trustworthy. People think that libraries are a major contributor to their communities in providing a safe place to spend time, creating educational opportunities for people of all ages, and sparking creativity among young people.

Overall, a large majority of Americans age 16 and older (77%) think libraries provide them with the resources they need. This is especially true for young people: 84% of those between the ages of 16 and 29 say this.

Similarly, two-thirds (66%) say that if their local public libraries were closed it would have a major impact on their communities as a whole. On this question, there are several notable demographic differences. Among those most likely to say that a library closing would have a major impact on their communities: women (74%); those between the ages of 50 and 64 (73%); and college graduates (71%). Those least likely to report that a library closing would have any kind of impact on their communities: those without high school degrees (15% say a local library closing would

People think closing their local public libraries would hurt communities

% of U.S. adults ages 16 and older who say closing their local libraries would have the following impacts on …
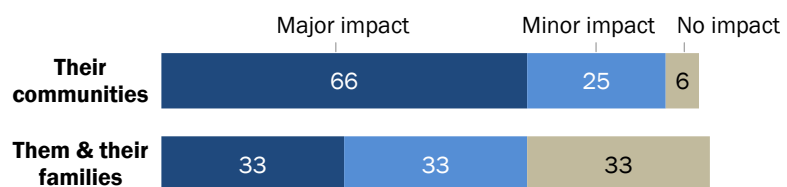
Source: Survey conducted March 7-April 4, 2016.
"Libraries 2016"

PEW RESEARCH CENTER

have no impact on their communities); non-internet users (15%); and those in households earning less than $30,000 (10%).

Thinking about the impact o**f a library's closing** specifically on them and their families, the perceived impacts are more muted. Some 33% say that a library closing would have a major impact on them or their families, and this feeling is especially prominent among Latinos (48% believe that their libraries closing would have a major impact on their families); 50- to 64-year-olds (42%); those with annual household incomes of $30,000 or less (41%); and women (39%). Those least likely to report that a library closing would have any kind of impact on them and their families: men (37% say this would have no impact on them and their families); those ages 18 to 29 (39%); those without high school degrees (40%); and those without minor children (36%).

People generally say that libraries contribute, to some extent at least, to their communities in a variety of ways. Of particular note is the role libraries play in helping people decide what information they can trust. There was a **large increase in people saying libraries help "a lot" in** deciding what information they can trust from 2015, when the figure stood at 24%, to 2016, where it now stands at 37%.

Opportunity is also a notion that comes to people's mind in thinking about libraries – whether that means a safe place to spend time, a place to pursue educational opportunity, or a place where creative juices flow. Those ages 16 and older were asked to consider how much their local public libraries contribute to their communities:

- 69% say their local libraries contribute "a lot" to providing a safe place for people to spend time.
- 58% think they contribute "a lot" toward creating educational opportunities for people of all ages.
- 49% believe they contribute "a lot" to sparking creativity among young people.
- 47% agree libraries contribute "a lot" to providing a trusted place for people to learn about new technologies.
- 38% say they contribute "a lot" to promoting a sense of community among different groups within their local areas.
- 37% believe they contribute "a lot" to helping people decide what information they can trust.
- 33% assert they contribute "a lot" to helping people when they seek health information.
- 29% believe they contribute "a lot" to serving as a gathering place for addressing challenges in their communities.

People see libraries as a safe place, a source of educational opportunity and trusted information, as well as a place to ignite creativity in young people

% of U.S. adults ages 16 and older who say libraries contribute 'a lot' or 'somewhat' to their communities by …

	A lot	Somewhat
Providing a safe place for people to spend time	69	20
Creating educational opportunities for people of all ages	58	29
Helping spark creativity among young people	49	31
Providing a trusted place for people to learn about new technologies	47	32
Promoting a sense of community among different groups within their local area	38	35
Helping people decide what information they can trust	37	37
Helping people seek health information	33	38
Serving as a gathering place for addressing challenges in their local community	29	36
Helping people find jobs or pursue job training	22	34
Helping people when natural disasters or major problems strike their communities	19	37

Source: Survey conducted March 7-April 4, 2016.
"Libraries 2016"

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- 22% say they **contribute "a lot" to** helping people find jobs or pursue job training.
- 19% think they **contribute "a lot"** when natural disasters or major problems strike their communities.

Women are more likely than men to think that libraries make several of these contributions to their communities, including providing a safe place (74% of women say libraries help do this **"a lot" vs. 65% of men),** providing a trusted place for helping people learn about new technologies (52% vs. 42%) and helping people decide what information they can trust (41% vs. 32%). These gender differences might result from the fact that women are more likely than men to have used libraries in the past year.

When asked to think about how libraries might change to better serve the public, Americans have a pretty clear message: help people learn digital skills without neglecting traditional functions. Specifically:

Women are more likely to think libraries contribute a lot to communities on key activities

% of U.S. adults age 16 and older who think libraries contribute 'a lot' to their communities in …

Source: Survey conducted March 7-April 4, 2016.
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- 80% of those ages 16 and older say libraries should "definitely" offer programs to teach people, including kids and senior citizens, how to use digital tools like computers and smartphones. This is a similar pattern captured in a 2015 survey.
- 57% think libraries should "definitely" have more comfortable spaces for reading and working. This is down slightly from the 64% who said this in 2015.
- 50% believe libraries should "definitely" buy 3-D printers and other digital tools to allow people to use them. This compares with 45% who said this in 2015.

▪ 24% say libraries should "definitely" move some print books and stacks out of public locations in order to free up more space for such things as tech centers, reading rooms and meeting rooms. This is a decrease from the 30% who said this in 2015.

Blacks and Hispanics are more likely than whites to say that libraries should definitely undertake several of these acts. For instance, 69% of blacks and 68% of Hispanics think libraries should provide more comfortable spaces for working and reading, while 51% of whites say that the same. Additionally, 69% of blacks and 63% of Hispanics say libraries should definitely buy 3-D printers and other high-tech tools, compared with 44% of whites. And 37% of blacks and 34% of Hispanics say libraries should definitely move books and stacks to provide other kinds of working spaces, while only 18% of whites think that.

2. Library usage and engagement

Americans' use of public libraries has fluctuated in recent years, and this survey shows that just under half of all those age 16 and older (48%) say they have visited a public library or bookmobile in person in the prior year. The high-water mark for library visits in Center surveys is 53% in 2012, in the aftermath of the recession when other research showed that visits to libraries for job searches were more prevalent than they are today. The 2015 figure was 44% who had visited a library or bookmobile in the previous 12 months.

Americans with college degrees are especially likely to have visited a public library in the past year (59% have done so), as are women (57%), parents (55%), and 16- to 29-year-olds (55%). Additionally, 52% of blacks and 50% of Americans living in households with annual incomes of $30,000 or less have visited the library in the past year.

The frequency in which library users visit libraries has also remained relatively stable since 2013. Among those who visited libraries in person in the previous year, 30% say they visit several times a month or more – which is comparable to the share of users who visited libraries that frequently in 2013 (31%) and 2015 (28%).

When it comes to accessing library websites, the survey finds that people are somewhat less likely to do this than in the past. Some 27% of respondents age **16 or older used a library's website** in the previous 12 months, down modestly from 31% in 2015. Use of mobile apps to access library resources is not too common among Americans: 8% said they had used public library mobile apps in the past year, compared with 12% who said they had done this in 2015.

For those who do visit public library websites, mobile access plays a large role. Half (49%) of those who have visited a public library website in the past year used handheld mobile devices (such as smartphones or tablets). That is largely unchanged since the spring of 2015, when 50% said this. But it is up from 2012, when 39% of library website users visited using handheld devices.

Two-thirds of library visitors borrow print books; around half go to read, study or engage with media

When asked why they visit public libraries in person, large numbers of library users cite fairly traditional reasons. These include borrowing printed books (64% of library visitors do this, down slightly from the 73% who did in 2012, but similar to the 66% who did so in 2015) or just sitting and reading, studying, or engaging with media (49%, identical to the share who did so in 2012).

Traditional activities – borrowing books or reading – dominate library use, but people are also attending classes or other programs

*% of U.S. **library users** ages 16 and older who say they did the following at libraries in the past 12 months*

Borrow print books	Just sit and read, study, or watch or listen to video	Get help from librarians	Attend classes, programs, or lectures	Attend meetings of a group you belong to	Search online or apply for jobs online	Use 3-D printers or other high-tech devices
66% / 64%	53 / 49	42 / 35	17 / 27	16 / 18	15 / 14	9 / 13
2015 2016	2015 2016	2015 2016	2015 2016	2015 2016	2015 2016	2015 2016
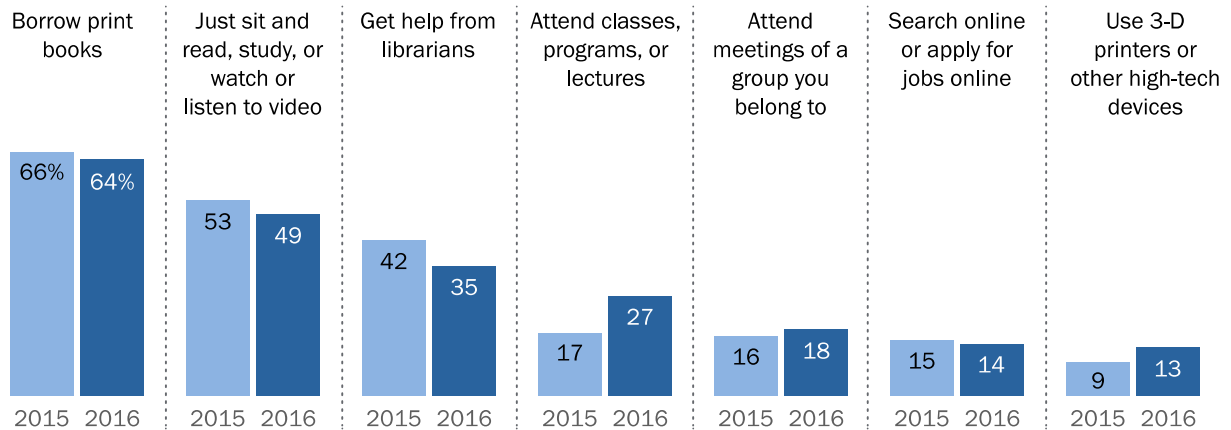
Note: 48% of those ages 16 and older used libraries or bookmobiles in the past 12 months.
Source: Survey conducted March 7-April 4, 2016.
"Libraries 2016"

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Other reasons for visiting libraries have grown more or less popular in recent years. In particular, far fewer library users are visiting libraries in order to get help from librarians: In 2012, 50% of library users had visited a library for this purpose, but that share decreased to 42% in 2015 and to 35% in 2016. On the other hand, 27% of library users have attended classes, programs or lectures at libraries in the last year a 10-point increase from the 17% who did so in 2015. Not a lot of Americans go to their libraries to use 3-D printers or other new tech devices: 13% did this in the previous year, a figure that is not significantly different from 2015.

People use computers and internet connections at libraries for the basics

People also go to libraries to use tech resources. In this survey, 29% of library-using Americans 16 and older said they had gone to libraries to use computers, the internet, or a public Wi-Fi network. (That amounts to 23% of all Americans ages 16 and above.) The library computer user figures are essentially the same as in 2015. In this context, it is worth noting that 7% of all Americans age 16 and older have used libraries' Wi-Fi signals outside when libraries are closed.

Library users who take **advantage of libraries'** computers and internet connections are more likely to be young, black, female, and lower income. Specifically, compared with the 29% of all library users who use computers at the library:

- 45% of library users between the ages of 16 and 29 used computers, the internet or **the library's Wi**-Fi.
- 42% of black library users **used libraries'** computers and internet connections.
- 35% of those whose annual household incomes are $30,000 or less used these resources.
- 33% of women used these things at the library.

Doing research or checking email are the most frequent uses of library tech resources, but more people are using them to take classes online than last year

*% of U.S. **library computer** users ages 16 and older who used library computers in past 12 months to ...*
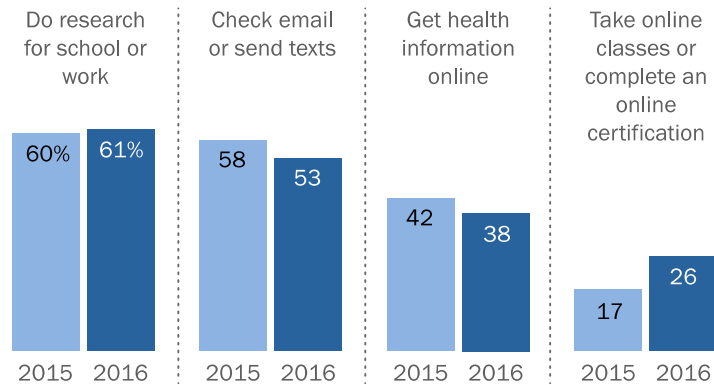
Note: 23% of adults ages 16 and older used library computers/internet connections in the past 12 months.
Source: Survey conducted March 7-April 4, 2016.
"Libraries 2016"

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When using tech resources at the library, most people do research for school or work (61% of library tech users did in the previous 12 months), followed by checking email or sending texts (53%). A share also get health information (38%) and 26% have taken online classes or completed a certification.

Although there have been modest changes in some activities using librar**ies'** digital resources, there has been a boost in the share of library tech users taking some sort of class or certification online.

Library websites are used for finding available resources or renewing books

For the 27% of people who have used library websites or mobile apps in the past 12 months, searching library catalogues, reserving or placing holds on items, renewing items, or doing research or h**omework are most prevalent. Here is what those who have used a public library's** websites or apps have done using those tools in the past 12 months:

- 58% of those who have used library websites in the past 12 months to search a library's catalogue.
- 44% of those website users reserved or placed holds on printed books, audiobooks, e-books, CDs or DVDs.
- 44% conducted research or got homework help.
- 40% renewed books, DVDs or CDs.
- 37% used online databases.
- 31% read book reviews or got book recommendations.

For Americans using libraries digital tools, searching library catalogues for content is the most prevalent activity

*% of U.S. **library website** users ages 16 and older who have done the following on library websites in the past 12 months*

	Searched library catalogues for print books, audiobooks, e-books, CDs or DVDs	Reserved or placed holds on print books, audiobooks, e-books, CDs or DVDs	Conducted research or got homework help	Renewed books, DVDs, or CDs	Used online databases	Read book reviews or got book recommendations
2015	66%	55	42	47	39	33
2016	58%	44	44	40	37	31
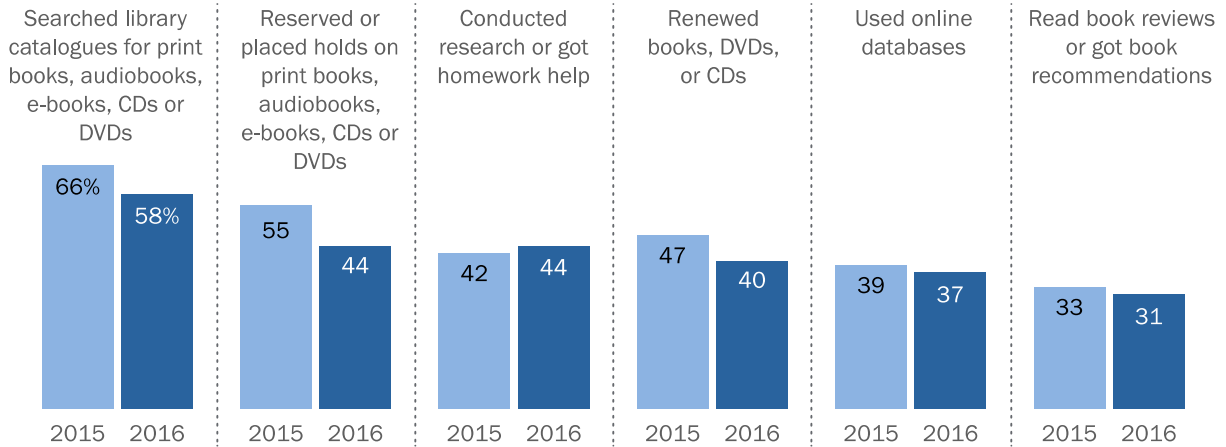
Note: 28% of those ages 16 and older who used library websites or mobile apps in the past 12 months.
Source: Survey conducted March 7-April 4, 2016.
"Libraries 2016"

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3. A portrait of those who have never been to libraries

Nearly half (48%) of Americans visited libraries in the past year. Roughly a third (32%) say they have used libraries at one time or another, though not in the past 12 months. Additionally, one-in-five (19%) say they have never visited a public library or a bookmobile. This has been a persistent trend in Pew Research Center surveys for five years, and we consistently see patterns in who these non-users are and how their views about libraries differ from more recent library users.

Those who have never been to a public library are more likely to be male (24% have never been to a library), ages 65 and older (26%), Hispanic (32%), black (28%), high school graduates or less (29%), or living in households earning less than $30,000 (27%). At the same time, the data show there are members of other demographic groups that have had no direct experience with libraries, including: 11% of those with college degrees and 12% of those in households earning $75,000 or more. Additionally, one-in-six parents of minor children (17%) say they have never been to a public library.

Non-library users are more likely to be male and have lower levels of educational attainment when compared with library users

% of adults in each group who ...

	Used library in the past 12 months (48% of adults)	Never visited a library or book mobile (19% of adults)
Gender		
Male	40	24
Female	57	15
Parental status		
Parents	54	17
Non-parents	46	21
Race/ethnicity		
White, non-Hispanic	48	15
Black, non-Hispanic	52	28
Hispanic	41	32
Age		
16-29	55	17
30-49	51	16
50-64	45	21
65+	40	26
Income		
Under $30K	50	27
$30K to $50K	44	18
$50K to $75K	52	12
$75K and over	51	12
Education		
High school grad or less	39	29
Some college	52	13
College +	59	11
Geography		
Rural	45	20
Urban	50	19
Suburban	48	20

Source: Survey conducted March 7-April 4, 2016.
"Libraries 2016"

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Despite the fact that they have no direct personal experience with libraries, many who have never been have relatively positive and affirming views about libraries, even though their level of enthusiasm is not as high as recent library goers. Recall that 77% of all Americans age 16 and above say libraries provide them with the resources they need. For those who have never used libraries, nearly two-thirds (65%) agree with this, possibly because other friends and family members get materials from libraries that are helpful. At the same time, 90% of those who are recent library goers say public libraries provide the resources they need.

In the same vein, more than half (56%) of those who have never been to a library say that the closing of their local libraries would have a major impact on their communities. Fully 77% of those who have visited their public libraries in the past year say that. When they consider the possibility of their local libraries closing, 19% of those who have never used libraries believe the closing would have a major impact on them and their families. That compares with 48% of recent library users who believe it would have the same impact.

Americans who have never been to libraries do not see the impact of one closing with the same intensity as library users

% of U.S. adults ages 16 and older who say closing their local library would have a ...

Source: Survey conducted March 7-April 4, 2016.
"Libraries 2016"

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As to attitudes about libraries, the main difference between library users and non-users has to do with trust and information. People who have used libraries in the past year are more likely than others to say that libraries are a resource that can help them decide what information to trust. Some 43% of library users say they agree "a lot" that libraries are a place that helps people decide what information to trust, while 29% of those who have never been say this. Again, this might stem from the possibility that non-users gain access to library resources through family and friends who are active library users.

Methodology

The analysis in this report is based on a Pew Research Center survey conducted March 7-April 4, 2016, among a national sample of 1,601 adults, 16 years of age or older, living in all 50 U.S. states and the District of Columbia. Fully 401 respondents were interviewed on landline telephones, and 1,200 were interviewed on cellphones, including 667 who had no landline telephone. The survey was conducted by interviewers at Princeton Data Source under the direction of Princeton Survey Research Associates International. A combination of landline and cellphone random-digit-dial samples were used; both samples were provided by Survey Sampling International. Interviews were conducted in English and Spanish. Respondents in the landline sample were selected by randomly asking for the youngest adult male or female who was at home. Interviews in the cellphone sample were conducted with the person who answered the phone, if that person was 16 years of age or older. For detailed information about our survey methodology, visit: http://www.pewresearch.org/methodology/u-s-survey-research/

The combined landline and cellphone samples are weighted using an iterative technique that matches gender, age, education, race, Hispanic origin and nativity, and region to parameters from the 2013 Census Bureau's American Community Survey and population density to parameters from the Decennial Census. The sample also is weighted to match current patterns of telephone status (landline only, cellphone only or both landline and cellphone), based on extrapolations from the 2014 National Health Interview Survey. The weighting procedure also accounts for the fact that respondents with both landline phones and cellphones have a greater probability of being included in the combined sample and adjusts for household size among respondents with landline phones. The margins of error reported and statistical tests of significance are adjusted to account for the survey's design effect, a measure of how much efficiency is lost from the weighting procedures.

DANGER AHEAD:
THE COMING COLLAPSE OF CANADA'S MUNICIPAL INFRASTRUCTURE

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Federation of Canadian Municipalities

SECTION 1: EXECUTIVE SUMMARY

"CANADA'S QUALITY OF LIFE AND ECONOMIC COMPETITIVENESS DEPEND IN PART ON HAVING RELIABLE, EFFICIENT INFRASTRUCTURE THAT IS PROVIDED IN LARGE PART BY THE MUNICIPAL, PROVINCIAL, TERRITORIAL AND FEDERAL GOVERNMENTS."

Restoring Fiscal Balance in Canada—Focusing on Priorities, Federal Budget 2006

Canadian municipalities build, own and maintain most of the infrastructure that supports our economy and quality of life. Yet for the past 20 years, municipalities have been caught in a fiscal squeeze caused by growing responsibilities and reduced revenues. As a result, they were forced to defer needed investment, and municipal infrastructure continued to deteriorate, with the cost of fixing it climbing five-fold from an estimated $12 billion in 1985 to $60 billion in 2003. This cost is the municipal infrastructure deficit, and today it has reached $123 billion.

The upward trend of the municipal infrastructure deficit over the past two decades points to a looming crisis for our cities and communities and ultimately for the country as a whole. The deficit continues to grow and compound as maintenance is delayed, assets reach the end of their service life, and repair and replacement costs skyrocket. When compared with earlier estimates, the $123-billion figure clearly shows the municipal infrastructure deficit is growing faster than previously thought.

Across Canada, municipal infrastructure has reached the breaking point. Most was built between the 1950s and 1970s, and much of it is due for replacement. We can see the consequences in every community: potholes and crumbling bridges, water-treatment and transit systems that cannot keep up with demand, traffic gridlock, poor air quality and a lack of affordable housing. The infrastructure deficit affects all communities, from major cities to rural, remote and northern communities, where municipal governments lack essential infrastructure and do not have the tax base to develop it.

Action is needed to eliminate this deficit and prepare for effective infrastructure management in the future. Since the first step in any project is to determine the scope of the problem, FCM commissioned Dr. Saeed Mirza of McGill University to survey municipal governments to determine their infrastructure needs as a first step toward determining the size, scope and growth rate of the municipal infrastructure deficit.

The $123-billion estimate includes "sub-deficits" for key categories of municipal infrastructure: water and waste water systems ($31 billion), transportation ($21.7 billion), transit ($22.8 billion), waste management ($7.7 billion) and community, recreational, cultural and social infra-structure ($40.2 billion). There is also an estimate of new infrastructure needs, defined as projects that increase infrastructure capacity through expansion and/or new construction. Similar to earlier studies, this report provides a "snapshot" of what municipal govern-ments identify as their infrastructure funding needs. It does not provide an exhaustive or complete account of the physical condition of municipal infrastructure.

If Canada is to prosper, municipal infrastructure investments must support the economic potential of our cities and communities. For this to happen, financing must reflect the long-term nature of infrastructure investments, which will require a long-term investment plan with agreed-upon priorities. This plan must bring long-term certainty to infrastructure funding, which will promote new efficiencies, technologies and best practices in infrastructure delivery.

Any serious plan to address the municipal infrastructure deficit must begin with an acknowledgement of the scope of the problem and the urgency to address it. This study represents the first step towards a real plan.

SECTION 2: INTRODUCTION

Over the past two decades, Canada's municipal infrastructure has continued to deteriorate. In 1985, it was estimated that $12 billion would be needed to fix our deteriorating municipal infrastructure [1]. By 1992 the figure had climbed to $20 billion,[2] and four years later it had more than doubled to $44 billion[3]. Since 2003, the municipal infrastructure deficit has been widely estimated to be $60 billion and growing by about $2 billion a year.[4]

In June 2007, FCM commissioned Dr. Saeed Mirza of McGill University to update the estimated deficit. A review of recent research suggested that the current estimate of $60 billion is out of date and that a combination of aging infrastructure and continuing deterioration is accelerating the deficit's growth. To test these findings, the project team conducted a survey of municipal infrastructure needs between October 6, 2007, and November 6, 2007.

This report provides an analysis of the survey results and a revised estimate of the municipal infrastructure deficit. As defined here and in previous studies, the "municipal infrastructure deficit" reflects the cost of maintaining and upgrading existing, municipally owned assets. The municipal infrastructure deficit does not include infrastructure owned by other orders of government (e.g. hospitals, schools, military bases, highways) or the cost of building new or expanded facilities to meet new needs or provide additional infrastructure capacity. This report also provides an estimate of new infrastructure needs, defined as projects that increase infrastructure capacity through expansion and/or new construction.

The goal of this report is to provide a more informed public discussion of how to deal with our municipal infrastructure funding challenges. Similar to studies conducted in 1985 and 1996, this report provides a "snapshot" of what municipal governments identify as their infrastructure funding needs. It does not provide an exhaustive or complete account of the physical condition of municipal infrastructure.

The report concludes with its single recommendation: that we establish a national plan to eliminate the municipal infrastructure deficit and prepare the groundwork for effective management of our infrastructure in the future. The first step in building that plan must be a comprehensive, national study—involving all three orders of government—to determine the size, scope and geographic characteristics of the municipal infrastructure deficit.

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1   FCM, *Municipal Infrastructure in Canada: Physical Condition and Funding Adequacy* (Ottawa, 1985).
2   FCM, *"Green Card" report,* (Ottawa, 1992).
3   FCM and McGill University, *Report on the State of Municipal Infrastructure in Canada* (Ottawa, 1996).
4   TD Bank Financial Group, *A Choice Between Investing in Canada's Cities and Disinvesting in Canada's Future* (2002), p. 12.

The Municipal Infrastructure Deficit: Root Causes

In 1961, during the initial phase of heavy investment in Canada's infrastructure, federal, provincial/territorial and municipal governments each controlled 23.9, 45.3 and 30.9 per cent of the national capital stock, respectively. By 2002, the federal government's share had dropped from 23.9 per cent to 6.8 per cent, and the municipal share had grown from 30.9 to 52.4 per cent of all infrastructure, an increase of nearly 70 per cent.

Figure 2
Public Capital Stock in Canada
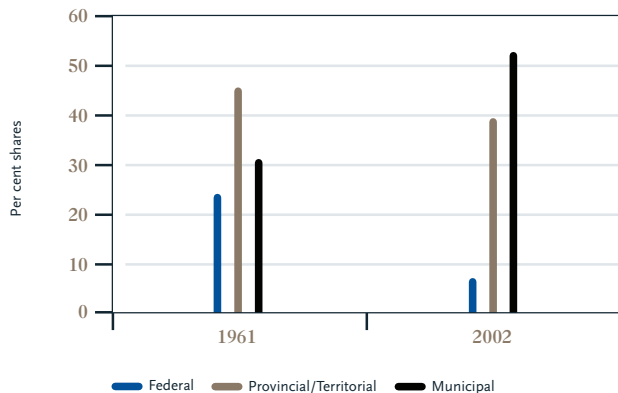
Declining Investment

Between 1955 and 1977, new investment in infrastructure grew by 4.8 per cent annually. This was a period of intense capital investment that closely matched Canada's population growth and rate of urbanization. This period stands in stark contrast to the 1978 to 2000 period, when new investment grew on average by just 0.1 per cent per year. Although the rate of population growth also declined, this does not account for the radical reduction in capital investment during this period. Clearly, all orders of government were under-investing.

More recently, capital spending by local governments has increased. Real investment spending posted an average annual increase of 7.5 per cent between 2001 and 2003. New investment—the portion of investment that actually adds to the overall capital stock—has been particularly strong, expanding at a rate of more than 11 per cent per year over the same period.

However, this recent growth in infrastructure spending should not be considered a solution to the infrastructure deficit. Much of this recent increase in investment can be traced to increased urbanization during the past 10 years, and it is not clear that the increase in capital stock is sufficient to meet population growth. Moreover, this increase in investment has not met the annual rehabilitation needs of existing capital stock, or alleviated the backlog of maintenance and rehabilitation that accumulated over the decade.

Aging Infrastructure

This situation is reflected in our aging municipal infrastructure. The average age of local governments' capital stock has increased since the end of the 1970s, because investment has been insufficient to replace deteriorating stock.

Infrastructure deficit

This analysis points to a tremendous fiscal challenge for municipalities. Over the past 40 years, municipalities have assumed a growing—and now the largest—portion of Canada's capital stock. This had to be financed mainly through the property tax, a form of taxation that is less responsive to economic growth than income and sales taxes. Since the late 1970s, as the responsibility for infrastructure investment shifted to municipalities and the municipal property tax, there was a precipitous decline in capital stock. As a result, the average age of municipal infrastructure increased significantly over this period. In short, a vicious cycle was created that led to a critical backlog of investments in municipal infrastructure, now known as the municipal infrastructure deficit.

Source: FCM, *Building Prosperity from the Ground Up: Restoring Municipal Fiscal Balance* (2006), p.37. (Taken from a chapter authored by Roger Gibbins, Canada West Foundation, and Mario Lefebvre, Conference Board of Canada)

Municipal infrastructure deficit now $123 billion

As shown in the previous section, the municipal infrastructure deficit is now estimated at $123 billion. This is composed of the following:
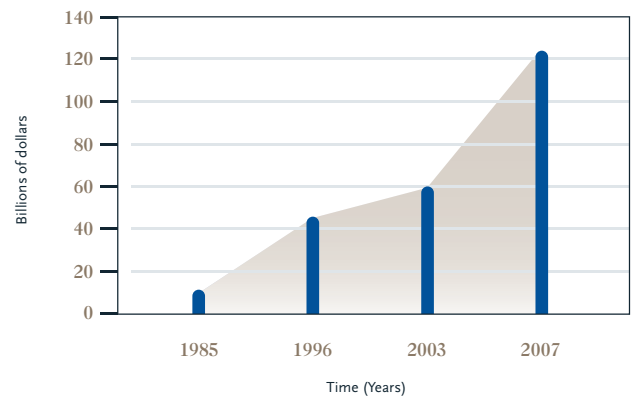
- $31.0 billion – water and wastewater
- $21.7 billion – transportation
- $22.8 billion – transit
- $40.2 billion – cultural, social, community and recreational infrastructure
- $ 7.7 billion – waste management

A review of the 2007 data shows it is consistent with recent research findings indicating that the municipal infrastructure deficit should be revised upward from its current estimate of $60 billion. Consistent with the findings of groups including the CWA, the CWWA and CUTA, the 2007 snapshot of municipal needs suggests a national, municipal infrastructure deficit in the range of $123 billion for existing infrastructure and about $115 billion required for new infrastructure needs.

The $123-billion estimate is comparable with the following deficit estimates:

- A 2003 Canada West Foundation estimate of up to $125 billion to upgrade Canada's infrastructure;
- A 2003 estimate by Mirza and Haider placing the national infrastructure deficit at $125 billion with the potential to grow to $400 billion by 2020; and

Figure 7
Municipal Infrastructure Deficit: Total Growth

- A preliminary revised estimate by Mirza of $99.8 billion for water and wastewater infrastructure (water distribution, supply and treatment, sanitary and storm sewers and treatment facilities), transportation (roads, sidewalks, curbs, bridges), transit (facilities, equipment and rolling stock) and others (community and social services, public buildings, recreational facilities, solid and hazardous waste), based on the projection of $88.5 billion for water and wastewater infrastructure by the Canadian Water and Wastewater Association (CWWA) and another $14 billion for transit systems by the Canadian Urban Transit Association (CUTA).[25]

It should be noted that the 2005 biennial survey of all U.S. infrastructure gave it a failing grade and estimated $1.65 trillion was needed to upgrade the infrastructure to an

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25 M. Saeed Mirza, *Toward a Revised Estimate of the Municipal Infrastructure Deficit*, for FCM (2007).

acceptable level. Based on the populations of the United States and Canada, a rough rule of thumb places Canadian numbers for most expenditures at about one-tenth of the corresponding U.S. expenditure. This would place the estimate of upgrading all of Canada's infra-structure at about $165 billion.[26] Given that governments in the United States recognized and reacted to the looming infrastructure crisis much earlier than their Canadian counterparts, the $123-billion deficit in Canada's munici-pal infrastructure deficit is well within this projection.

Discussion

Among the key findings of the 2007 survey are the following:

- Cultural, social, community and recreational facilities are aging and have deteriorated considerably. Lack of capacity is also a pressing issue. Some municipalities have dealt with the crisis by investing considerable funds in dealing with the problem. However, many others have directed capital dollars toward other pressing infrastructure needs (water, wastewater, transportation) and must now make overdue invest-ments in these areas. The deficit in existing infra-structure for this category is now estimated to be $40.2 billion, compared with the 1996 deficit of $7.55 billion.
- Water supply, wastewater and stormwater systems are approaching the end of their service life, especially in older communities. The municipal infrastructure deficit for these categories stands at $31 billion, a 47 per cent increase since 1996, when the deficit was estimated at $21 billion.
- Significant funding is needed to address deteriorating transportation assets. The funding gap for existing infrastructure has grown from $10.75 billion in 1996 to the present $21.7 billion.
- Canada's urban transit systems were built mainly in the 1960s. Deterioration has been considerable, and many facilities need to be repaired or rehabilitated. Transit fleets need considerable investment. The municipal infrastructure deficit for this category was estimated at $3.05 billion in 1996. Based on the 2007 survey, the deficit in this category has increased dramatically to $22.8 billion.

- The waste-management deficit has also increased significantly, from about $1 billion in 1996 to $7.7 billion today.

Figure 8
Municipal Deficit for Existing Infrastructure by Category
(Billions of Dollars)

- Water Supply Systems
- Wastewater and Stormwater Systems
- Transportation
- Transit Systems
- Cultural, Social, Community and Recreational Facilities
- Waste Management
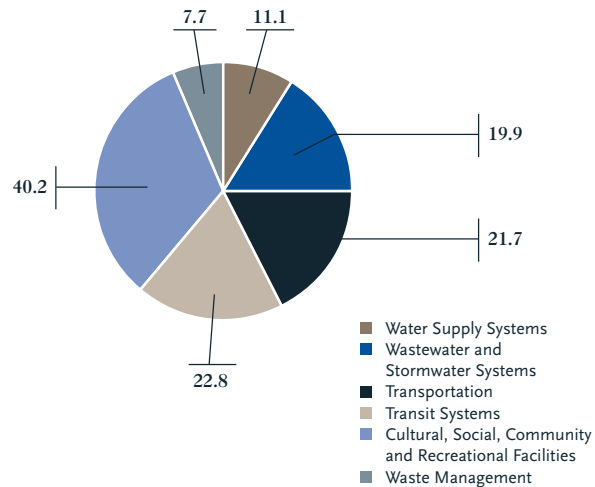
- The growth trend of the municipal infrastructure deficit in the last two decades has reached crisis proportions. In 1985, the estimated deficit was $12 billion, which may have been conservative due to the overall lack of information about existing infrastructure. Canada's infrastructure deficit reached $44 billion 10 years later, according to the 1996 FCM-McGill survey.
- When set beside earlier estimates, the $123-billion figure clearly shows the municipal infrastructure deficit is growing faster than previously thought.
- In 2003, the Technology Road Map estimated that the municipal infrastructure deficit stood at $57 billion. However, unlike studies in 1985, 1996 and 2007, the 2003 estimate was not based on new survey data.
- The new survey reveals a considerable increase in unmet needs for existing infrastructure, which stand at about $123 billion. The survey included a more com-prehensive list of assets in each category. However, the infrastructure covered by the survey questionnaire was consistent with the previous FCM-McGill 1996 survey for comparison purposes.

26 American Society of Civil Engineering, *ASCE Report Card on U.S. Infrastructure* (2005).

Ontario Culture Strategy: Telling our stories, growing our economy

https://www.ontario.ca/page/ontario-culture-strategy-telling-our-stories-growing-our-economy

A vision for culture in Ontario

An Ontario where every person has the opportunity for creative expression and cultural participation, and where the diversity of our stories and communities is reflected, valued and celebrated, now and as part of our legacy to future generations.

Principles to guide government support for culture:

Creativity and innovation

Culture exposes us to new ideas and inspires new ways of thinking. Support for culture should help to nourish and reward creativity, exploration, experimentation and innovation.

Quality of life and economic development

Culture contributes significantly to both quality of life and economic development in Ontario. Support for culture should help to enrich our lives, strengthen and animate our communities and build a dynamic business environment in Ontario.

Diversity and inclusion

Ontario's rich diversity is one of our greatest strengths. We should all have the opportunity to participate in Ontario's diverse cultural life, regardless of age, background, language, ability or where we live in the province. Support for culture should recognize people with disabilities and people who are Deaf as cultural and linguistic communities with unique identities, experiences and values.

Respect for Indigenous peoples

Indigenous cultures, languages and heritage represent distinct identities, histories and ways of life. Ontario is committed to reconciliation by strengthening and transforming its relationship with Indigenous communities and by implementing changes that reflect Indigenous priorities.

Collaboration and partnerships

The talents and contributions of many people and organizations make our culture sector strong and vibrant. Support for culture should encourage collaboration and partnerships among provincial ministries and agencies; municipal, provincial/territorial, federal and Indigenous partners; not-for-profit arts and culture organizations; the private sector; and all communities and individuals.

Public value and accountability

Government investment in culture should be guided by what Ontarians value and by what makes a positive difference in the lives of individuals and communities. This ministry, its agencies and the organizations we fund are accountable for achieving the best possible outcomes within available resources.

Excerpts from 4 Key Goals & Strategies

Goal 1: Promote cultural engagement and inclusion
Focus on removing barriers and increasing opportunities for cultural participation.

Strategy 1– Reduce barriers and encourage greater participation in culture
- bring together Ontario government granting partners to share best practices and increase access and inclusion throughout the application and assessment process, and ensure that representatives of communities who may face barriers to accessing culture funding are actively involved in the discussions, including Indigenous, Francophone and ethno-cultural communities, people with disabilities and people who are Deaf, and people living in rural and remote areas
- continue to support culture agencies, organizations and other partners to remove barriers for people with disabilities and people who are Deaf to increase opportunities for creation and participation in arts and culture
- identify and promote ways to increase opportunities for Ontario's seniors to engage with arts and culture in their communities in many different ways, including as artists, mentors, volunteers and participants

Strategy 2 – Inspire the next generation and help youth build careers in the culture sector

- continue to identify and promote opportunities for collaboration and partnerships between the culture and education sectors to increase opportunities for participation in arts and culture and learning through the arts
- develop a new fund to support publishers in creating curriculum-linked learning resources aimed at fostering the use of diverse Canadian content in schools
- continue to support Ontario's culture agencies, attractions and organizations in offering opportunities for children and youth to engage with arts and culture and in promoting youth engagement in the heritage sector

Strategy 3 – Strengthen our relationships with Indigenous communities and work toward reconciliation

- in collaboration with Indigenous peoples, establish an ongoing dialogue to address shared culture priorities, such as preservation of Indigenous cultural heritage and languages and participation in all aspects of Ontario's cultural life
- help facilitate cross-cultural understanding between First Nations, Métis and Inuit communities and museums and other culture organizations to create stronger relationships and partnerships

Expected results
- there will be fewer barriers to accessing culture funding
- people of all ages and abilities will have more opportunities to engage with arts and culture
- youth will have more information and supports available to help them pursue careers in the culture sector
- there will be stronger relationships between Indigenous communities, the province and culture organizations to support Indigenous culture priorities

Goal 2: Strengthen culture in communities
Focus on strengthening community-based arts, culture and heritage

Strategy 1 – Help build strong community-based culture organizations

- work with government partners and culture stakeholders to maximize the use of public libraries, museums, galleries and other culture facilities as community hubs and explore opportunities to integrate arts and culture activities and spaces into schools and other community facilities
- review and update provincial funding programs for public libraries to build the capacity of libraries serving rural and remote communities, improve digital services and support leadership and innovation
- collaborate on the continued implementation of the Ontario Volunteer Action Plan footnote 26 [26] and promote the Partnership Grant Program, footnote 27 [27] which helps build the capacity of the not-for-profit sector, including arts and culture organizations

Strategy 2 – Conserve and promote Ontario's diverse cultural heritage
- help heritage property owners use clean, low carbon technologies, and enable the province to develop and share expertise on heritage and energy conservation, by leveraging opportunities for energy efficiency improvements through Ontario's Climate Change Action Plan
- provide online access to information about Ontario's cultural heritage, including designated heritage properties and provincial heritage properties
- develop additional tools to help communities identify and protect their cultural heritage, including guidance on cultural heritage landscapes, cultural planning, and the interests of Indigenous communities in conserving cultural heritage, to support municipalities in implementing the Provincial Policy Statement (2014) footnote 28 [28]
- work with the Ministry of Government and Consumer Services and heritage organizations to support local archives to promote, preserve and facilitate access to Ontario's diverse documentary memory for current and future generations

Strategy 3 – Connect people and communities by sharing and celebrating our diverse heritage and cultures
- bring together culture and tourism agencies and attractions and Indigenous partners to increase public awareness and understanding of Indigenous histories, cultural heritage, knowledge and ongoing contributions to arts and culture in Ontario
- continue to engage with the Government of Québec to facilitate and foster information exchanges, work collaboratively on common issues and develop joint projects under the Agreement for Cooperation on Culture between the Government of Ontario and the Government of Québec relating to the arts, cultural industries, footnote 29 [29] public libraries and heritage

Expected results
- there will be more recognition and use of public libraries and other culture facilities as community hubs
- Ontarians will gain greater understanding of cultural heritage conservation and there will be more tools to assist in conserving Ontario's unique cultural heritage
- funding will be targeted to support a greater diversity of organizations and key priorities (e.g., digital services)

- cultural heritage conservation will be more inclusive of Indigenous communities and perspectives
- Ontarians will be more aware of Indigenous contributions to arts and culture in the province

Goal 3: Fuel the creative economy

Focus on maximizing the contributions of the creative economy to Ontario's cultural vitality and economic prosperity

Strategy 1 – Make Ontario a culture leader at home and internationally

- with the permanent Ontario Music Fund as a foundation, continue to build Ontario as a leading North American centre for music production and performance, as well as spur music tourism by setting a vision and directions to further the development of the Ontario Live Music Strategy
- continue to work with Ontario's growing interactive digital media companies to build a globally competitive industry that can innovate and succeed in the next generation of interactive entertainment, including video games, augmented and virtual reality, mobile content and cross-platform storytelling
- seek opportunities to grow the culture sector within the framework of the Business Growth Initiative by working with partner ministries to foster innovation and help scale up companies:
  - o explore the development of entrepreneurship and commercialization programs designed for the arts and cultural industries, including the promotion of partnerships between firms and across sectors to share risk and maximize expertise
  - o explore opportunities to strengthen the use of design as a key competitive advantage in the knowledge economy, for example by promoting the application of design in manufacturing and technology
  - o accelerate the creation and adoption of new disruptive technologies footnote 31 [31] to strengthen the culture sector's role in the knowledge economy
- work with the Ministry of Infrastructure and other ministries to inform the development of a long-term infrastructure plan for Ontario to better understand and work toward addressing the needs of the culture sector
- collaborate with government partners and the tourism industry to identify opportunities to grow cultural tourism in Ontario, including Francophone tourism and Indigenous-led tourism, and offer authentic and compelling visitor experiences

Strategy 2 – Strengthen Ontario's culture workforce

- develop a better understanding of the impact of the digital transformation on culture … build capacity to address digital challenges and take advantage of new opportunities
- increase awareness and uptake of the Canada-Ontario Job Grant footnote 32 [32] among employers in the culture sector to assist them in developing their workforces through employer-led digital skills and other training
- help ensure that Ontario's culture workforce is positioned to succeed in the knowledge economy by creating opportunities to enhance technical and business skills training and foster learning opportunities for arts and culture sector students and workers…
- explore ways for provincial and federal immigration programs to contribute to the growth and success of Ontario's culture sector and eliminate barriers to the successful integration of cultural workers

- engage federal, provincial and territorial culture partners on strategies to improve the socioeconomic status of artists and to improve support for culture-related infrastructure

Expected results
- there will be better coordination throughout the Ontario government to integrate the cultural industries into Ontario's broader economic agenda
- more Ontarians will be equipped with the skills and knowledge necessary to contribute to the creative economy

Goal 4: Promote the value of the arts throughout government

Focus on enhancing the profile of the arts sector across government for the benefit of the sector and all Ontarians

Strategy – Inspire greater integration of the arts into public policy and programs
- develop an Arts Policy Framework in collaboration with Ontario's culture agencies, actively promote the Framework to government ministries and agencies and monitor how well it is working

Expected results
- the Arts Policy Framework will be a catalyst for creative and innovative integration of the arts to advance Ontario's social and economic objectives
- awareness of Ontario's diverse arts community will be increased within the Ontario government and its agencies

Moving forward

Implementing the Culture Strategy

The Culture Strategy contains actions to guide the government's support for culture over the next five years. We can implement some actions in the short term, within the next one to two years. Two examples are bringing together government granting partners to share best practices and increase access and inclusion (Goal 1) and working with First Nation public libraries to better understand their unique needs (Goal 2).

In the next phase of this initiative, we will develop a plan to guide the implementation of the Culture Strategy and track our progress in meeting its commitments.

Measuring and reporting on progress

The expected results for each goal in the Culture Strategy provide a broad idea of what we want to achieve. As we implement the Strategy, we will develop objectives that are more specific, along with performance measures for individual actions. In five years, we will publish a special progress report on the implementation of the Culture Strategy. This will allow us to take stock of what we have accomplished and what we still need to achieve.

Continuing the dialogue

The Culture Strategy public engagement process began a conversation about the future of arts and culture in Ontario. Implementation of the Strategy will establish new channels of communication to continue the dialogue.

letter from the city librarian and the toronto public library board chair

How people live, work, learn and play is changing, and it's important for the library to change with them so that we can continue to provide relevant library service and have positive impacts on the lives of Torontonians.

That's why every four years, through consultations, surveys and industry research, we identify customer needs, as well as city and industry trends, to tell us how we should be prioritizing our work to make sure that we deliver services and outcomes you have told us are important to you. And of course, the library has an important role to play in helping the city achieve its economic and social goals as well – to improve the quality of life for its residents, and to help make us all more resilient, more knowledgeable, more connected and more successful.

The title of our strategic plan speaks to three significant outcomes we've set out to achieve in the next four years: expanding **access**, increasing **opportunity** and building **connections**. We'll achieve this by focusing on six key priority areas: advancing our digital platforms, breaking down barriers to our services, expanding access to technology, providing more opportunities for continuous and self-directed learning, creating community connections, and transforming our library service to deliver exceptional customer service in the digital age.

Our plan is an ambitious one, responsive to the results of extensive public consultation, and grounded in achievable results. With the plan as our guide, Toronto Public Library is undertaking transformational change, and innovating to deliver better service.

We are very excited about this new Strategic Plan and see it as a great opportunity to enhance the way we deliver our current services and programs. This is also our opportunity to help move the dial on important social, economic, educational and digital challenges the city and its residents are facing, while continuing to serve the needs of our diverse and vibrant library community.

We look forward to serving you better than ever.

Vickery Bowles
City Librarian, Toronto Public Library

Ron Carinci
Chair, Toronto Public Library Board

our six strategic priorities

advancing our **digital platforms**

breaking down barriers to access and driving inclusion

expanding access to **technology and training**

establishing TPL as toronto's centre for **lifelong and self-directed learning**

creating **community connections** through cultural experiences

transforming for 21st century **service excellence**

expanding **access**
increasing **opportunity**
building **connections**

Toronto Public Library serves residents and communities in ways no other institution can. We empower Torontonians to thrive in the digital age and global knowledge economy through expanded access to technology, lifelong learning and diverse cultural and leisure experiences, online, in our branches and in the community. We have the capacity and resources to deliver high quality, customer-focused services where, when and how our customers need them. We continue to be nimble and innovative in the way we deliver services and programs, embracing emerging technology and creating spaces that encourage and support engagement within and between communities.

TPL's 100th, the Scarborough Civic Centre branch

expanding **access**

here's what expanded access will look like

Easy, local, convenient access to a broad range of library collections and services, where, when and how Torontonians need and want them, and an exceptional customer experience at every point of need

The fast pace of busy urban life puts time at a premium, and with changing patterns of work, study and school, Torontonians find it increasingly challenging to access services and participate in daily life. A barrier-free, personalized and customized omni-channel environment to access services, complete transactions and engage with others is no longer a "nice-to-have" but a "must-have", especially for the more isolated and vulnerable residents of Toronto.

Easy access to educational, social and cultural resources and experiences is not always available equally across the city, creating a success gap and limiting opportunities for people of all ages, at various stages of their lives.

One in five Ontarians reports feeling high levels of "time crunch" in their lives.

Customers use an average of four different channels when interacting with an organization. 92% expect organizations to offer self-service options.

Only 59% of Canadian low income households have Internet access at home.

Studying at Cedarbrae branch

increasing **opportunity**

here's what increased opportunity will look like

Expanded access to current and emerging technology; new experiential, collaborative and eLearning opportunities; and safe after school social and learning environments for children and youth, to help reduce the digital divide; expand Toronto's knowledge, skills and networks; and engage learners of all ages

Building an equitable society means creating opportunities for people to grow, learn and succeed in a variety of ways. Despite living in one of Canada's wealthiest cities – and one of the country's major engines of growth – many Toronto residents do not have equal economic, educational, health and social opportunities that are so critical to achieving prosperity, advancement and overall well-being.

Access to information and pathways to learning can be "great equalizers," and are foundations for lifelong success. In the 21st century, access to opportunity is increasingly dependent on access to online information and services, current and emerging technologies, social connections and supports for lifelong and self-directed learning.

More than one in six Canadian adults have low literacy skills.

Half of children in families with annual incomes under $30,000 do not regularly participate in out-of-school arts or sports programs.

Technology-enabled teaching and learning practices play a significant role in supporting the development of a full range of 21st century competencies.

Checking out at Woodside Square branch

building **connections**

here's what building connections will look like

Vibrant, welcoming public spaces that are community hubs, connecting people with people, people with community, community with community and the city as a whole, through engaging cultural, creative, social and leisure experiences and opportunities that are animated and facilitated by library staff, community partners and collaborators

Connection is one of our basic human needs. Whether it's to one another, to community, to culture or as a way to facilitate expression and share experiences, connection is the foundation of a healthy society. More and more, people are feeling disconnected despite today's hyper-engaged, multi-channel world of social media and 24-hour news cycles. Some are isolated due to a lack of access to digital media or local community engagement.

This dearth of opportunities for meaningful connections is adversely affecting people's well-being, civic involvement and overall social cohesion. And with cultural literacy an essential skill for success in a diverse, global society and creative economy, access to rich local cultural opportunities and experiences is so important.

Ontarians have experienced a 23.5% decline in their social networks in the past ten years.

More than one in five Torontonians 55 years and older live alone. 44% of those age 85 and older live alone.

People who read and participate in cultural activities are more likely to be socially active, volunteer, donate, do favours for others and feel a strong sense of social belonging.

8   Toronto Public Library **Strategic Plan 2016-2019**

The library's vision for the future is built on core strengths, clear focus, and enduring values. Children's literacy, preserving the past, lifelong learning, intellectual freedom, equitable access to a diversity of information and ideas, and welcoming and accessible public space. These are as important today as they have ever been and provide a strong and stable foundation on which to build our plan.

vision

Toronto Public Library will be recognized as the world's leading library by informing and inspiring Toronto and its communities, making us all more resilient, more knowledgeable, more connected and more successful.

mission

Toronto Public Library provides free and equitable access to services that meet the changing needs of Torontonians. The library preserves and promotes universal access to a broad range of human knowledge, experience, information and ideas in a welcoming and supportive environment.

values

1. Equity: Accessibility, respect and fairness

2. Diversity: Valuing individual needs, experiences and differences

3. Intellectual Freedom: Guaranteeing and facilitating the free exchange of information and ideas in a democratic society, protecting intellectual freedom and respecting individuals' rights to privacy and choice

4. Innovation: Encouraging creativity, experimentation and the generation of ideas

5. Inclusion: Welcoming participation in decision making and service development by residents and communities

6. Integrity: Open, transparent and honest in all our dealings

7. Accountability: Taking responsibility for our actions and the services we provide

8. Service Orientation: Providing excellent, responsive services.

Enjoying a great read

HAMILTON'S VitalSigns®

2015

Hamilton's Economic Renaissance: A prosperity unevenly shared

A Vital Signs Report from Hamilton Community Foundation

Updated January 2016

Prepared by Sara Mayo
Social Planning and Research Council of Hamilton

SPRC
SOCIAL PLANNING & RESEARCH COUNCIL OF HAMILTON

HAMILTON COMMUNITY FOUNDATION

History made, future intended.

Hamilton's Economic Renaissance: A prosperity unevenly shared

Introduction

Headlines around Hamilton's economy seem to be regularly positive: housing starts are strong, unemployment rates are low, bankruptcy rates are in decline, commercial development continues to grow[1] and Hamilton has the most diversified economy in Canada[2]. There is no doubt that a number of indicators often selected and reported do indeed suggest some conditions are improving and that the economic successes being generated in the city of Hamilton that bode well for the apparent improving prosperity in the community, with some calling it a 'renaissance'.[3]

However, these indicators tell only part of the story. There are other measures of community wellbeing and stress that suggest many residents are not yet sharing in the benefits of Hamilton's increasing prosperity.

Hamilton is experiencing the same major economic forces affecting all communities in Southern Ontario. The knock down effects of major downsizing in the manufacturing sector over the last two decades continues to ripple into communities across Ontario. The subsequent growth in more temporary, insecure and low- paid jobs, especially in the service sector is a shift that does not seem to have reached its peak yet.

This study takes a closer look at these forces as well as the trends being reported, and broadens the scope of indicators in order to better understand the extent to which there may be contrasting views and experience of prosperity in Hamilton with particular attention to who's missing out.

This report will focus on a few important comparators where possible: Hamilton's historical trends along with selected other communities for geographic comparisons. Although quite different in significant ways, the Census Metropolitan Areas of Toronto, Hamilton and Kitchener-Waterloo-Cambridge are the three largest in Southern Ontario and are often in a competitive relationship with each other for residents, employment and commercial development. For this reason the city of Toronto and region of Waterloo (the municipal/regional boundaries where possible often at the CMA level, or using), have been chosen as the primary geographic comparisons included in this report, along with the average for Ontario.

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[1] City of Hamilton. (2014). *Investment Update* and City of Hamilton (2013). *Community Report*: http://www.investinhamilton.ca/research-and-data/publications/
[2] Conference Board of Canada data cited in City of Hamilton. (2013). *Integrating tools for successful economic development: The Hamilton model.* https://www.amo.on.ca/AMO-PDFs/Events/CONF13/mccabe.aspx
[3] MacLeod, M. (2015 March 26). *Hamilton's renaissance is no illusion: It's happening and it's real, senior city planner tells group.* Hamilton Spectator: http://www.thespec.com/news-story/5525892-hamilton-s-renaissance-is-no-illusion/

Section 1: Major Economic Indicators

What's the evidence that all of Hamilton's citizens are sharing the prosperity of Hamilton's renaissance?

Both employment and unemployment rates have improved in Hamilton and are better than the provincial average, but with growing numbers of young adults moving to Hamilton, youth unemployment has remained at recession levels of 15%. While the number of people on social assistance has fallen more quickly than any city in Ontario since the recession, Hamilton still remains above the provincial average. Poverty rates, similarly, have shown no improvement since 2001.

Other highlights:

- Hamilton CMA's working age employment rate has performed better compared to Ontario since the most recent recession, but since 2012 has dropped due to large declines in the employment rates of young women and older men.

- Toronto's much higher youth unemployment rate may give Hamilton youth some pause who may be currently considering moving to Toronto for better job opportunities.

- Hamilton's youth employment rate has decreased in the last decades, a similar trend observed across Ontario. In Hamilton, however, this trend has extra urgency as the city's growth of young people is rising much faster than in other communities.

- In 2012, Hamilton's growth rate of young adults (aged 20-29) was the highest since at least 1987. In contrast, the growth rate for young adults has declined in both Toronto and Waterloo since 2005-6.

- Young adults are clearly a major driving force of Hamilton's 'renaissance'. But if the growing youth population does not find employment in Hamilton, the growth could be reversed.

Unemployment rate

The unemployment rate is often cited as the primary indicator of Hamilton's increasing prosperity. Monthly unemployment data often shows the Hamilton CMA to be among the communities with the lowest unemployment rates in Ontario and, in some months, Canada as a whole. But the Hamilton CMA includes the municipalities of Burlington and Grimsby, and these two cities have much lower poverty and unemployment rates than Hamilton, partly due to the higher price of housing in those communities, so people with lower incomes just can't afford to live in Burlington or Grimsby. To better understand the reality in Hamilton, municipal level data is more useful than CMA data.

Annual unemployment data is available for the City of Hamilton, and does confirm that Hamilton's unemployment rate is improving compared to the average for Ontario. Chart 1 shows that the city of Hamilton's unemployment rate has declined to 6.2% in 2014, from a high of 9.3% in the last recession (2009). This almost exactly mirrors the decline in the Region of Waterloo. In contrast the City of Toronto's unemployment rate has barely changed since the recession and was 9.5% in 2014. The average for Ontario sits between these two distinct trends, with Ontario's unemployment rate at 7.3% in 2014.

The City of Hamilton's unemployment rate in 2014 (6.2%) was still higher than the 1998-1999 period where it went as low as 5.4%. The rate for Hamilton's neighbouring municipalities of Burlington and Grimsby continues to be lower than Hamilton (5.5% in 2014)[5].

Chart 1. Unemployment rate, City of Hamilton, and selected communities, 1987-2014
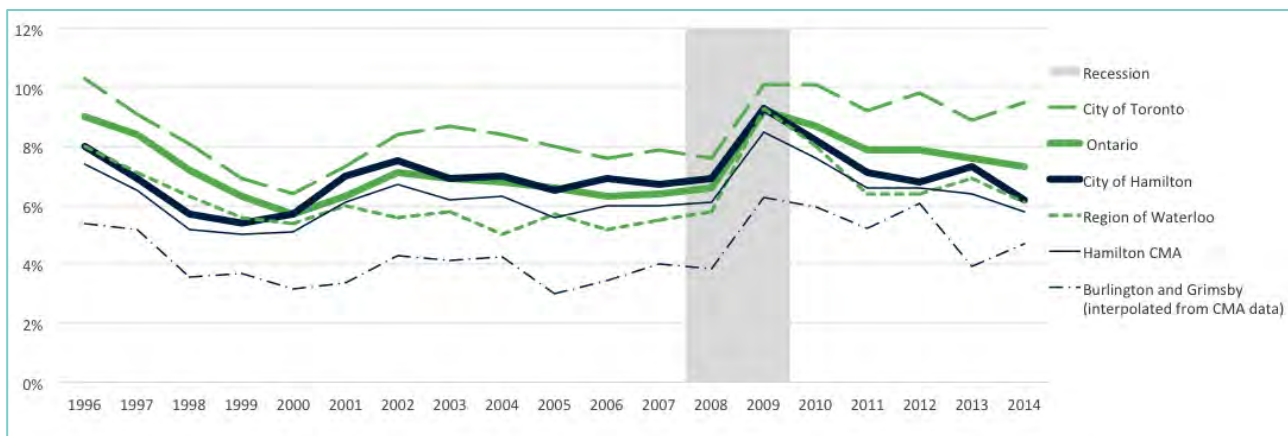
Data source: Statistics Canada (CANSIM tables 109-5334, 109-5304 and 109-5004: Labour Force Survey, 1996-2014)

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[5] The rates for the combined Burlington and Grimsby part of the Hamilton CMA were calculated by interpolating from Hamilton CMA and city of Hamilton data.

Employment rate

The unemployment rate as an indicator is quite limited in what it explains about the labour market. To meet the Statistics Canada definition of unemployed, a person without a job has to be actively looking for work. Many others consider themselves unemployed, but have been discouraged from searching for work because their experience of the labour market has been so negative they don't see how they could ever get a job. Others may consider themselves unemployed, but feel the only way to regain a foothold in the labour market is to postpone their job search and return to school to upgrade their skills.

Both of these groups would not be counted as unemployed, but as people "not participating in the labour force". Other non-participants in the labour force include people without jobs who may be doing so by choice, such as retired people, or others raising their children full-time, so the participation rate is not an entirely suitable indicator of economic health either.

The employment rate is an indicator favoured by some economists, as it is simplest to understand: the percentage of a population (over age 15) who are working. But when some communities have large number of older residents, there is a lower employment rate because of the larger pool of retired workers. Limiting the employment rate to the 15-64 age group is called the "working age employment rate" and can be more helpful for comparing different communities.

Chart 2 shows the working age employment rate for the Hamilton CMA since 1987 compared to other communities. Since the 2008-9 recession, less than three quarters of 15-64 year olds in the Hamilton CMA have been working, which is a lower proportion than in the 1987-1990 and 2003-2005 periods. But when comparing to the average for Ontario and the Toronto CMA, the Hamilton CMA's working age employment rate has performed better since the most recent recession. The working age employment rate in Kitchener-Cambridge-Waterloo CMA continues to substantially outperform the Hamilton CMA, as it has since at least 1987, with the exception of the height of the 2008-2009 recession.

Since 2011, however, the working age employment rate in the Hamilton CMA has dipped from about 74% to about 72% in 2014, the same as in the 2008-2009 recession period. A more detailed analysis shows that this recent drop is driven almost entirely by large declines in the employment rate of young women aged 15-24 and older men aged 55-64. The employment rate of young women has gone from 64% in 2011 to 53% in 2014 and for older men aged 55-64, their employment rate has slipped from 66% in 2011 to 60% in 2014. The reasons for these rapid declines in these groups are not clear, but could be due to a combination of factors including more young women staying in school or training, more young women and older men facing unemployment, more older men retiring early (due to choice or layoffs), or unstable data due to smaller sample sizes for these groups. The employment rates of these groups will need to be monitored to see if the trend continues and better understand the factors that are causing the decline in the employment rate of these groups.

Chart 2. Working age employment rate (age 15-64), Hamilton CMA and selected communities, 1987-2014

Data source: Statistics Canada (CANSIM tables 282-0053 and 282-0129: Labour Force Survey, 1987-2014)

Due to their relative lack of paid labour market experience, youth as a group always face a more challenging time obtaining paid employment. The gap between youth and overall unemployment rates is an important indicator of the disproportionate challenge faced by youth in different regions or time periods and the stress they experience in trying to gain a foothold in the labour market.

Annual data for youth unemployment rates (ages 15-24) is available at the municipal level, however it is best to examine the trends over longer periods than just year over year, because annual estimates can go up and down dramatically due to Statistics Canada's Labour Force Survey's small sample sizes.

Chart 3 shows that the youth unemployment rate has not recovered to pre-recession levels in any of the communities examined. The city of Hamilton has among the highest youth unemployment rates in the comparison communities. The city of Toronto is unique among the communities examined as the youth unemployment rate has continued to soar in the years after the recession, hitting 20% for the 2012-2014 period. This finding may give some pause to Hamilton youth who may be currently considering moving to Toronto for better job opportunities. For all communities, the youth unemployment rate is around double the general unemployment rate. The Region of Waterloo however has the smallest gap between the youth

Growth of the young adult population

Hamilton's quality of life, historical character, growing culture and entertainment sector, access to nature, lower housing prices than Toronto and growing emphasis on sustainable transportation like cycling and LRT is clearly attracting many Millennials to stay here or move from other communities.

Chart 5 shows that Hamilton's youth growth rate (aged 20-29) was 2.0% in 2013-14, more than double the average for the general population (0.9%). In 2012, Hamilton's growth of the young adult age group hit 3.1%, the highest since at least 1987. Some of this growth can be attributed to general demographic shifts with the large Millennial generation entering adulthood, however, Hamilton's growth rate has been higher than the average for Ontario (1.6% growth in the provincial young adult population in 2013-14).

In contrast, the growth rate for young adults has declined in both Toronto and Waterloo since 2005-6. The differences between Waterloo and Hamilton are most stark, with the city of Hamilton having a larger population of young adults aged 20-29 than the region of Waterloo, for the first time since 2001. Hamilton's population of young adults reached 81,250 in 2014, a rise of over 6,800 persons compared to 2010.

The rise of youth employment networks in Hamilton, such as HIVE, is another sign that young adults are a major driving force of Hamilton's 'renaissance'. But if Hamilton's economy does not welcome this growing youth population into the labour market, the growth may be reversed and Hamilton's reputation for renaissance could be short-lived.

Chart 5. Growth rate of young adults (aged 20-29), compared to general population growth, City of Hamilton and selected communities, (2005-6 to 2013-14)
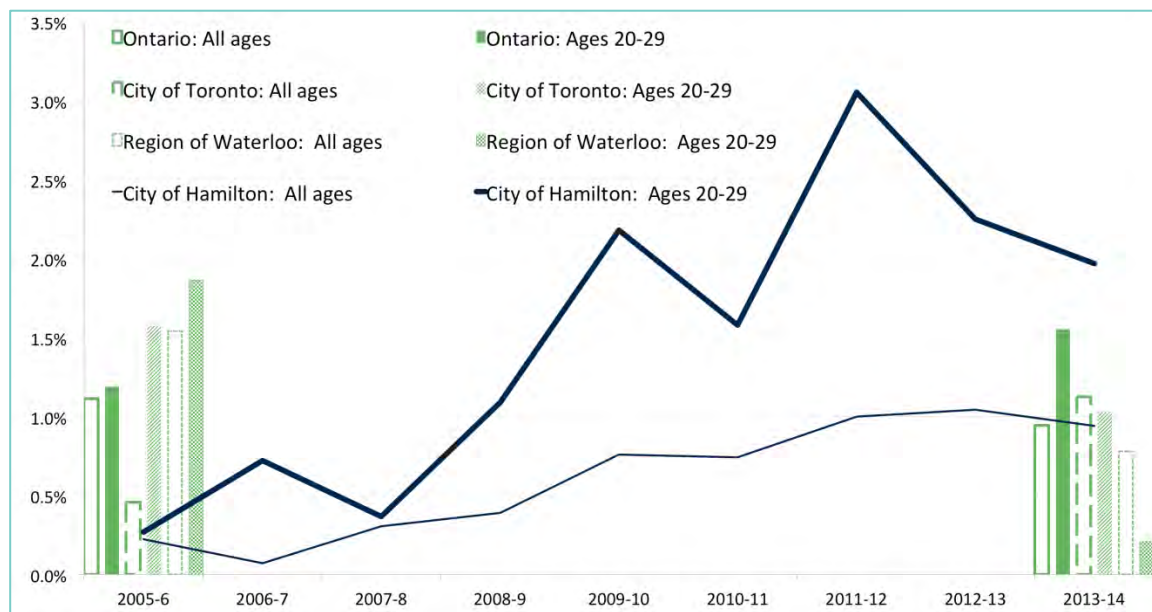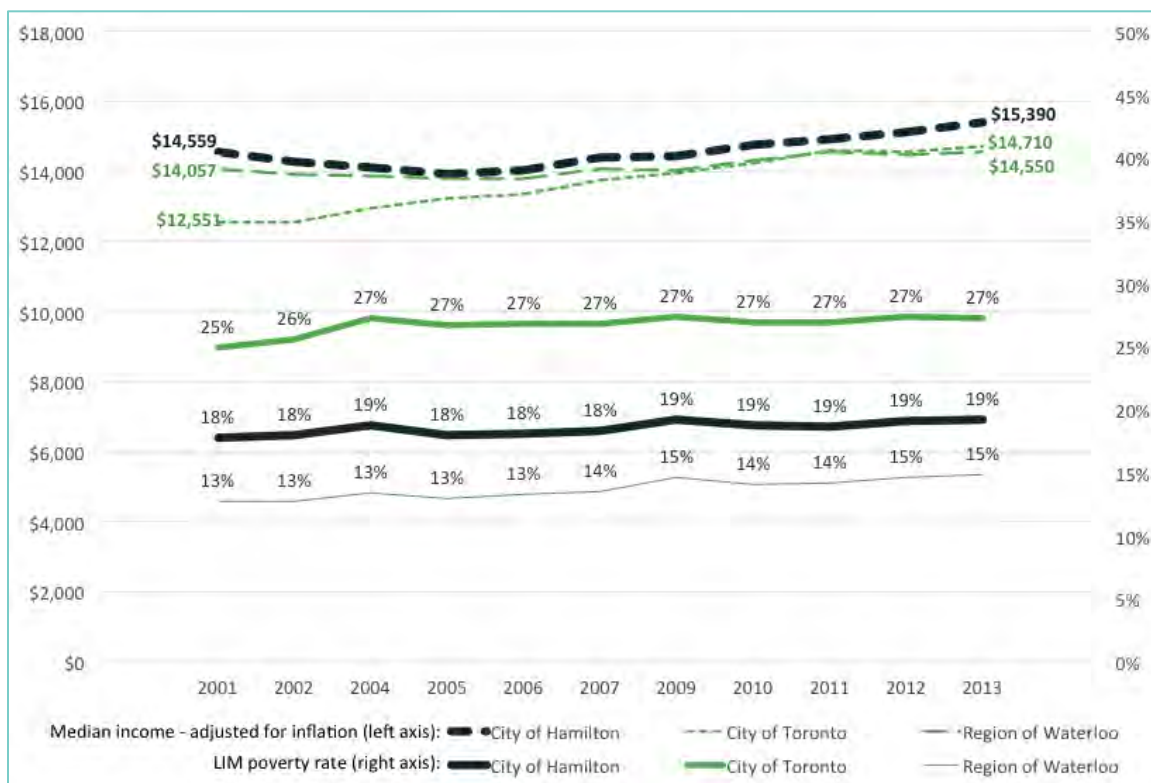

Data source: Statistics Canada (CANSIM Table 051-0062: Estimates of population, 1987-2014)

Poverty rates

The City of Hamilton's overall poverty rate has not improved in the 2001-2013 period, similar to the trend for Toronto and Waterloo (chart 6). Hamilton's poverty rate was approximately 19% in 2001, in between the rate for Waterloo (15%) and Toronto (27%).

The median income (adjusted for inflation) of persons with low incomes has improved in all three communities examined. The introduction of the Ontario Child Benefit in 2008 corresponds with an increase in the median income for low-income residents, reversing Hamilton's decline in median incomes in this group from 2001-2005. The OCB now increases the income of very low-income parents by over $1,300 per child and is especially useful for parents leaving social assistance for a low-wage job as they can keep this benefit as they transition into the paid labour market. The median income of persons in low income in these three communities remains, however, less than three-quarters of the poverty line, as defined by Statistics Canada's before tax Low Income Measure.

Chart 6. Percentage of persons with a family income below the before tax Low Income Measure (LIM) and median income of low-income residents (adjusted for inflation in 2013 dollars), City of Hamilton, City of Toronto and Region of Waterloo, 2001-2013

Data source: Statistics Canada, T1 Family Tax Filer data (2001-2014)

Data note: Tax filer data has important limitations when used to analyse poverty rates. Tax files only have limited family information concerning couples, parents and dependents living in the same household, and the data does not have information about extended families living in the same household and financially supporting each other. Therefore, taxfiler data can over-estimate the poverty rate, especially in communities where there is a higher rate of extended families living in a household. Due to the elimination of the mandatory long-form census, taxfiler data is used as a replacement, but the data quality is not as high.

Section 3: Geography of jobs in Hamilton

Where are Hamilton's jobs?

Consistent with where some of the biggest effects of Hamilton's renaissance are being felt, the largest number of jobs are in lower Hamilton, the Mountain, and Hamilton's waterfront. This is less true for Hamilton's youth: the majority of jobs for youth tend to be offered in Hamilton's malls and retail areas – which are generally suburban – creating challenges for youth living in central and east Hamilton. Despite Hamilton's growing economy, there are fewer jobs than workers, so about 3 in 10 workers commute to other municipalities to work.

Highlights:

- The top three locations of jobs in Hamilton are in the central lower city, the Mountain and the industrial waterfront area.

- The location of youth jobs shows that teen jobs are most numerous in Hamilton's malls and retail areas, which are mostly spread out in Hamilton's mountain and suburban areas. Hamilton's youngest workers, those aged 15-19, face a particularly challenging job market and those challenges grow in areas where there are few youth jobs close to home or school.

- Teenagers in Central and East Hamilton have more limited access to nearby jobs: only 19% of all jobs held by teenagers are in these areas combined, while 27% of Hamilton's teens aged 15-19 live in Central or East Hamilton.

- The reduced access to jobs for teenagers in Central and East Hamilton is especially concerning because these are the same areas that have the highest poverty rates in the City. For teens who grew up in poor households, lack of job market access early in their worklife may be contributing to a reduced likelihood of escaping poverty as they transition to adulthood.

- The highest estimated proportions of part-time and low-income work for all age groups are in rural and suburban areas and Hamilton Mountain.

- The employees with the highest income are more likely to be working in Central Hamilton, or the McMaster and Industrial areas. Despite the major decline in industrial jobs in the last three decades in Hamilton, industrial jobs continue to be of relatively high quality, with the remaining jobs in that area having by far the highest estimated percentage of full-time workers (93%).

Jobs types by regions: Job quality

To get a general sense of job quality in each region of Hamilton, charts 23 and 24 below show the estimated proportions of low- and high-income jobs as well as full- and part-time jobs in each area. These are estimates only, as the workers' full/part-time status and income data is from the previous year and may not be related to their current job location. The data reveal the highest estimated proportions of part-time and low-income work are in rural and suburban areas and Hamilton Mountain.

The employees with the highest incomes are more likely to be working in Central Hamilton, or the McMaster and industrial areas. Despite the major decline in industrial jobs in the last three decades in Hamilton, industrial jobs continue to be of relatively high quality, with the remaining jobs in that area having by far the highest estimated percentage of full-time workers (93%).

Chart 23. Estimate of proportion of high- and low-income jobs in each region of Hamilton, 2011

Region	Proportion of workers with total income $80,000 or higher in previous year, by area of current workplace	Proportion of workers with total income under $30,000 in previous year, by area of current workplace
City of Hamilton average	22%	38%
Ancaster	21%	43%
Central Hamilton	27%	32%
Dundas	22%	42%
East Hamilton	20%	42%
Flamborough	17%	47%
Glanbrook	14%	43%
Industrial area	27%	21%
McMaster and area	27%	40%
Mountain	17%	46%
Stoney Creek	20%	36%

Data source: Statistics Canada (National Household Survey, 2011)

Three major themes can be drawn from a review of policy recommendations from various Canadian think tanks and social policy commissions:

1) An emphasis on increased access to experiences and opportunities, especially for children and younger adults that help provide ladders into the middle-class.

For example

Youth jobs guarantee (Broadbent Institute), a proposal for:

- opportunities for all youth under age 25 within four months of leaving formal education or becoming unemployed, by creating 186,000 three month full-time, co-op positions paid internship or summer job placement that pay a wage of $15 an hour, funded by large employers and the federal government.

Creating accessible opportunities for children and youth (PEPSO) by:

- Reducing financial and scheduling barriers for after-school programs, sports and recreation programs for children and youth whose parents work in precarious jobs.

- Prioritizing training that connects with real employment opportunities and that meets the unique needs of workers in precarious employment.

Adult Education and Training Strategy for Canada (Institute for Research on Public Policy), including:

- an improved student loan system for people already in the workforce who want to upgrade their skills, by reducing expectations for spousal contributions and reducing risk to the student by making repayment conditional on improved income after training.

- A rebuilt apprenticeship model for skilled trades, which would more closely resemble the format and accessibility of other forms of post-secondary education. This is especially urgent for Ontario, which has the lowest completion rate for apprenticeships among Canadian provinces, at less than 40% between 2000-2012.

For Hamilton, the findings in this report about youth access to jobs should spur action to ensure youth living in under-served neighbourhoods have better access to a first job in the early part of their labour force years.

Some local efforts that can be built on in the area of increased experiences and opportunities include:

- ABACUS is a new Hamilton Community Foundation initiative focused on improving post-secondary access (including skilled trades and apprenticeships) among children who face barriers which may include no history of post-secondary attendance in their families.   With research showing that skills shortages now and in the future will require prospective employees to have

post-secondary credentials to be competitive, ABACUS reaches to students in the middle school years – and their parents – and uses a combination of academic upskilling, mentoring, goal setting and incentives to help children see post-secondary in their future and set a path to achieve it.

- The City of Hamilton, has recently received funding from Ontario's Local Poverty Reduction Fund to create a "Learning Annex" that would address some of the barriers some students face by providing personalized education and training navigation and related support services for youth in underserved neighbourhoods.[21]

- As part of its broader access strategy, Mohawk College has opened the first of six mini satellite sites (called "City School") in neighbourhoods with high unemployment rates offering tuition-free courses and access to computers and college resources.

- The Hamilton Public Library now offers free access to Lynda.com video tutorials that teach digital and business skills as well as two digital media labs where residents can access necessary technology to explore and use these skills.

- The United Way funds a variety of after-school and extra curricular activities for children in lower income neighbourhoods, as well as mentoring programs like Big Brothers and Big Sisters.

- Workforce Planning Hamilton's Labour Market Plan recommends learning from the new Hamilton Immigrant Mentoring Partnership program to draw lessons on how to build a successful employment mentorship program for other groups facing labour market challenges, including youth.

2) A call for the modernization of Canada's social safety net and employment support programs, including child care and affordable housing, to reflect a changing labour market

For example

Renewing Canada's Social Architecture (The Mowatt Institute), a series of policy papers on specific ways the social safety can be rejuvenated, through for example:

- A drug benefit program and better retirement pension system for workers without employment-sponsored health benefits or pension plan.

- Effective and improved childcare and child benefit policies.

- Improved access to affordable housing for those priced out of market housing.

- Enhancing the federal government's role in disability supports.

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[21] Wingard, J. (2014). *Working Together: Examining Employment, Education, and Training Strategies for the Jamesville, Beasley, and Keith Neighbourhoods.* City of Hamilton Neighbourhood Action Strategy, Mohawk College and Workforce Planning Hamilton.

- Groups like the Hamilton Roundtable for Poverty Reduction, the Hamilton Legal Clinic and Hamilton Organizing for Poverty elimination (HOPE) have calling for the creation of a social assistance rates review board that would bring rates closer to the real cost of living and increase dignity within the social assistance system.
- The Best Start Network in collaboration with Hamilton's Neighbourhood Action Strategy has led a pilot campaign to increase the number of low-income parents registering their children for the Canada Learning Bond, which singed up close to 200 additional families for the federal government's grant for post-secondary education, totaling over $1 million when the children graduate from high school.

- After a successful pilot program funded through the Hamilton Community Foundation, school boards in Hamilton have now implemented vision screening in high-priority schools, which has alerted hundreds of families to previously undetected eye diseases and increased access to glasses and medical care.

- The City of Hamilton along with partners in the private and community sectors is currently implementing its ten-year Housing and Homelessness Action Plan, with a goal of increasing the supply of affordable housing.

3) Improvement in employment conditions and access to labour market information

For example

Enable more secure employment (PEPSO), through measures such as:

- Building a business case to show the bottom-line benefits for employers when they reduce precarious working conditions.

- Addressing discrimination in hiring, job retention and advancement.

- Expanding coverage of provincial labour standards to more worker

- Reducing scheduling uncertainty.

Improve enforcement of employment standards (Workers' Action Centre), including:

- Targeting sector with patterns of violations and high use of precarious employment.

- Provide legal assistance to workers making claims of violation of employment standards.
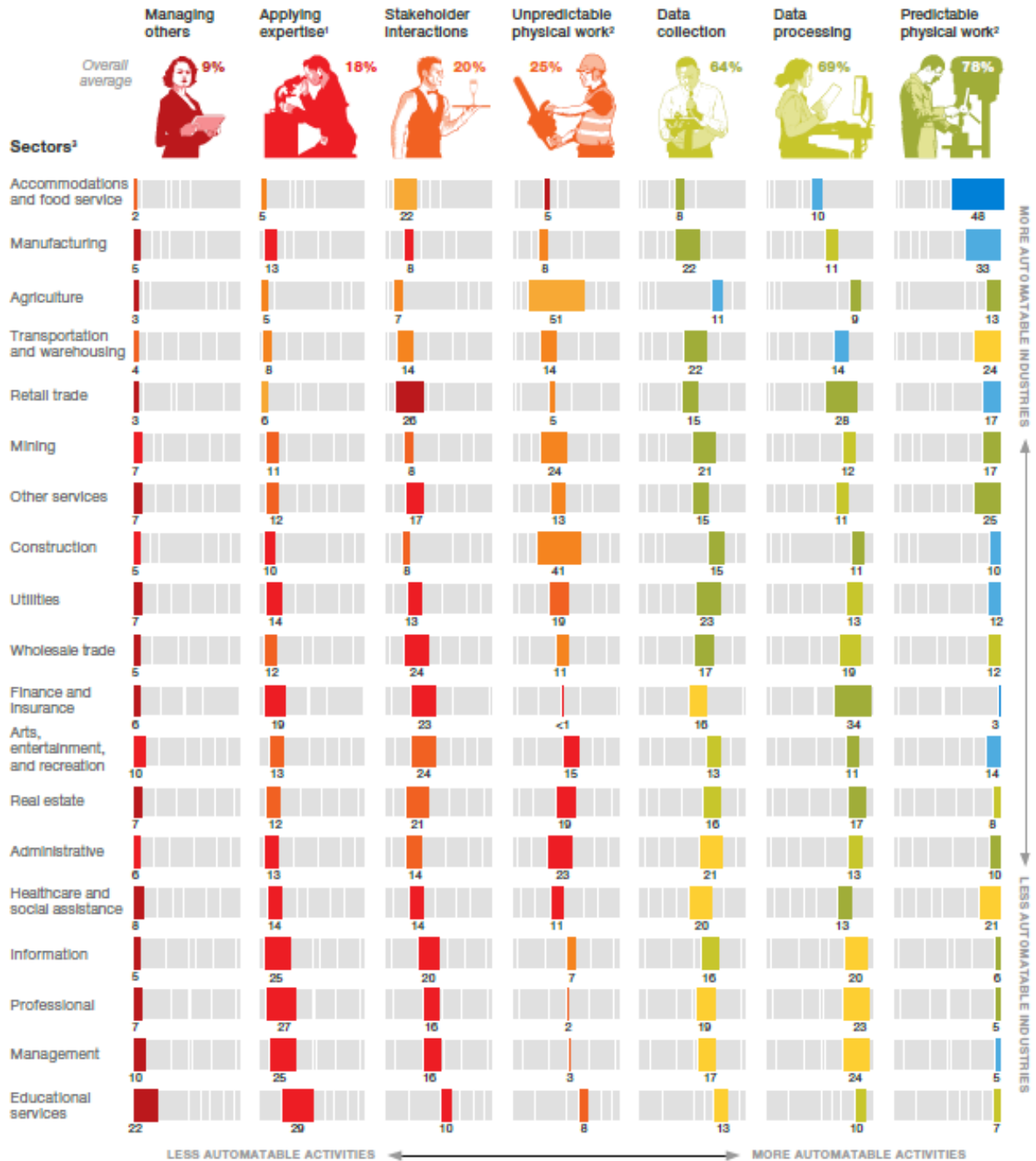
Set minimum wage to $14/hour to ensure all full-time jobs lift workers out of poverty (Canadian Centre for Policy Alternatives):

- The increase to the minimum wage would bring Ontario closer to a living wage, which can decrease turnover costs for employers without negatively affecting employment levels.

The technical potential for automation in the US

Many types of activities in industry sectors have the technical potential to be automated, but that potential varies significantly across activities.

Technical feasibility: % of time spent on activities that can be automated by adapting currently demonstrated technology

0 — 50 — 100

Sectors[3]	Managing others (Overall average 9%)	Applying expertise[1] (18%)	Stakeholder interactions (20%)	Unpredictable physical work[2] (25%)	Data collection (64%)	Data processing (69%)	Predictable physical work[2] (78%)
Accommodations and food service	2	5	22	5	8	10	48
Manufacturing	5	13	8	8	22	11	33
Agriculture	3	5	7	51	11	9	13
Transportation and warehousing	4	8	14	14	22	14	24
Retail trade	3	6	26	5	15	28	17
Mining	7	11	8	24	21	12	17
Other services	7	12	17	13	15	11	25
Construction	5	10	8	41	15	11	10
Utilities	7	14	13	19	23	13	12
Wholesale trade	5	12	24	11	17	19	12
Finance and insurance	6	19	23	<1	16	34	3
Arts, entertainment, and recreation	10	13	24	15	13	11	14
Real estate	7	12	21	19	16	17	8
Administrative	6	13	14	23	21	13	10
Healthcare and social assistance	8	14	14	11	20	13	21
Information	5	25	20	7	16	20	6
Professional	7	27	16	2	19	23	5
Management	10	25	16	3	17	24	5
Educational services	22	29	10	8	13	10	7

MORE AUTOMATABLE INDUSTRIES → LESS AUTOMATABLE INDUSTRIES

LESS AUTOMATABLE ACTIVITIES ← → MORE AUTOMATABLE ACTIVITIES

COLLECTIVE IMPACT INSTITUTE

MOVING BEYOND COLLABORATION TO TRANSFORMING COMMUNITIES

TAMARACK
An Institute for Community Engagement

The Collaboration Continuum

Trust

Compete	Co-exist	Communicate	Cooperate	Coordinate	Collaborate	Integrate
Competition for clients, resources, partners, public attention.	No systematic connection between agencies.	Inter-agency information sharing (e.g. networking).	As needed, often informal, interaction, on discrete activities or projects.	Organizations systematically adjust and align work with each other for greater outcomes.	Longer term interaction based on shared mission, goals; shared decision-makers and resources.	Fully integrated programs, planning, funding.

Turf

Loose　　　　　　　　　　　　　　　　　　　　　**Tight**

2

1

Thinking About Shared Measurement

Process: # of people/orgs at table, # of community presentations, articles, etc	Progress: # of programs, # of new initiatives, etc
	Shared Measurement	
Policy: policy changes in own or other organizations, new investments, gov. policy changes	Population : # of people moved out of poverty, # of high school graduates, # of low birth weight babies
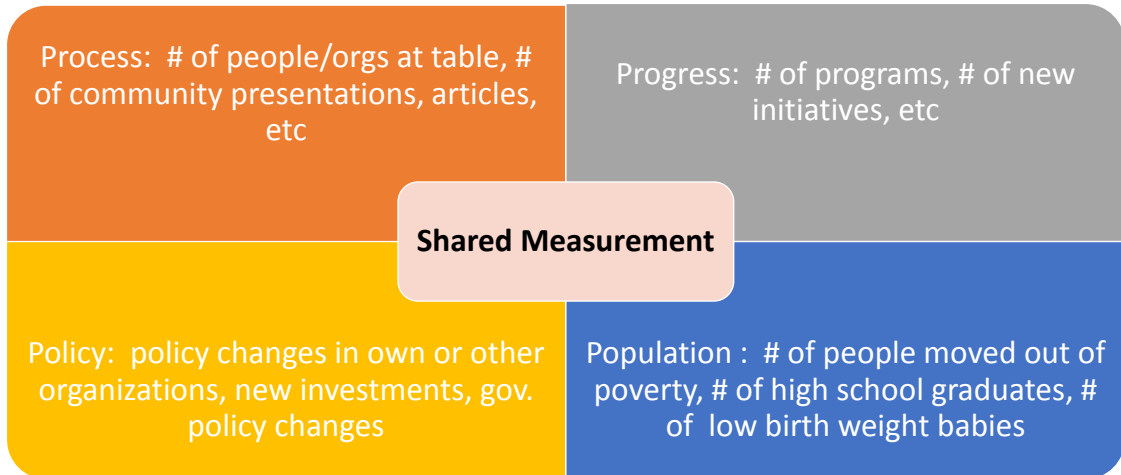
Mutually Reinforcing Activities

- Agreement on key outcomes.

- Orchestration and specialization.

- Complementary – sometimes "joined up" - strategies to achieve outcomes.