

Date: April 2017
To: Chair and Members of the Board
From: Paul Takala, Chief Librarian/CEO
Subject: **Report on the 2012-2016 Strategic Plan**

RECOMMENDATION

That the Hamilton Public Library Board receive this report for comment.

BACKGROUND

In May 2012 the Library Board adopted its strategic priorities for the period 2012 to 2016. This report provides a high level overview of significant accomplishments for this period. Initiatives have been captured under the priority that they most closely align with, however, it needs to be acknowledged that many initiatives embody more than one of the priorities.

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.

INTRODUCTION

The priorities adopted in 2012 were a reworking of the 2009 priorities. While all of the priorities have resonated and help marshal the organization's discretionary resources in a clear direction, the priority *Community Beacon* has captured the spirit of HPL for many. As one manager said in 2013 past strategic priorities have been meaningful but the current priorities, especially *Community Beacon*, "sing". *Community Beacon* challenges HPL to create both physical and online experiences that people can be proud of.

FACILITY RENEWAL

Since 2012 HPL has made significant progress towards advancing the goals set-out in the Facilities Master Plan. In 2011 six library locations were listed as not being able to continue to provide service in their current locations. Currently there are only two locations from that list, Carlisle and Mount Hope, that lack an approved and funded renewal or replacement project. In the case of Carlisle a feasibility study funding by the City of Hamilton Recreation Department is nearing completion. Progress on key facility projects since 2012 include:

- ✓ **Terryberry** – Major renovation was completed in 2012.
- ✓ **Lynden** – Construction of new branch was completed in 2013.
- ✓ **Waterdown** – Construction of new facility was completed in 2015.

- ✓ **Central Phase 2** - Renovation of 2nd floor and refurbishment of the elevators was completed in 2014.
- ✓ **Central Phase 3** – In December 2013 a space study and capital funding for 4th Floor renovation, basement and Hamilton Wentworth meeting rooms was approved. Renovations were completed in early 2016.
- ✓ **Central Windows** – This lifecycle replacement project was awarded \$400,000 in Canada150 funding in 2017. Work will commence on lifecycle replacement of windows on floors 2 through 6 later in the year.
- ✓ **Binbrook** – A feasibility study and capital funding for construction of a new building was approved in 2015. A temporary location has been leased to provide service during the construction period. Construction of the new building is currently underway.
- ✓ **Dundas** – A feasibility study was completed in 2014 for a renovation of the existing branch and capital funding has been secured. A temporary location leased and a bookmobile stop has been added to provide service during the construction period. Construction is currently underway.
- ✓ **Greensville** – Capital funding was approved for a joint project with the City of Hamilton and the HWDSB. The project is scheduled to be completed in 2018.
- ✓ **Locke** – A feasibility study of the Locke vestibule was completed with capital funding approved in 2017. Ward 1 funding has been secured to enhance the project. Construction to be scheduled.
- ✓ **Valley Park** – A feasibility study was completed and capital funding for the expanded branch was approved in 2016. The design tender is in process.
- ✓ **Carlisle** – A feasibility study is to be presented to the Board in April 2017.
- ✓ **Facility Sustainability** – During the course of the strategic plan construction projects have been paired with some reductions in HPL's overall facility footprint. During this period: Rockton and Millgrove were closed, the unused 2nd floor of the Saltfleet branch was sold to the HWDSB and the move of Technical Service back to Central released significant space in the former Stoney Creek City Hall.

CREATING SAFE AND WELCOME SPACES

In 2012 HPL was facing an increase in security related incidents especially at the Central library. While the incidents were small in number compared to overall visits the sense of safety for customers and staff was being challenged. To address this in a way consistent with our values, a comprehensive strategy was adopted. Building on previous work, including the weekly Administration Team review of all incident reports, the following actions were taken:

- ✓ To better equip staff to safely and compassionately diffuse incidents, **Prepare Training** developed by the Crisis Prevention Institute (CPI) was expanded in 2013.
- ✓ A new **Security Supervisor** position was created in 2013 along with an in-house **Community Resource worker** (Social Worker) in 2014. Both positions are located at Central but are available to support staff system-wide.
- ✓ An updated **Security Camera Policy** was approved in 2013 and improved security cameras have been installed.
- ✓ A new **security services contract** was issued in 2014 to improve pay of security guards combined with requiring more qualified guards.

- ✓ **Activities and targeted programs** to engage individuals in places where there have been a reoccurrence of incidents has been employed successfully.

LIBRARY LOGO, VISUAL PRESENCE AND WEBSITE

During this strategic plan significant improvements to our print, signage and online presence have been accomplished. Most significantly a new logo and visual style was approved in 2014. Other significant changes include:

- ✓ Updated external and internal **signage** installed at most locations.
- ✓ A new print **program guide** that better represents the significant offerings of learning programs at HPL was introduced.
- ✓ **Special branding** was done to celebrate the 125th Anniversary in 2015 and other key library activities.
- ✓ An **eNewsletter** was launched in 2016 to further highlight programs, resources and events
- ✓ In March 2015 a **new responsive website** was launched based on updated open-source software Drupal 7. The new website has advanced accessibility, improved the visual appeal and works on all kinds of devices, including mobile.

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.

INTRODUCTION

At the start of the strategic plan in 2012 there was a rapid adoption of eBooks taking place in North America. HPL and other libraries were faced with many publishers refusing to provide access to popular titles to public libraries because of concerns that access would undermine their eBook sales. Growth in eBooks and other digital formats continues today but at a slower rate. Publishers are now selling eBooks to public libraries but often at terms that are not favourable. While access to published materials continues to be our largest single area of activity, better measuring and understanding other key services has been a focus of this term.

ENHANCED METRICS AND REPORTING

Significant progress has been made during this strategic plan to enhance planned reporting of key metrics. The goal has been to ensure Library management and the Board are effectively monitoring trends and responding in a proactive way. Key examples of this are:

- ✓ In 2014 the **Counting Opinions** customer service survey was implemented to assess customer satisfaction and identify challenges people face with using HPL.
- ✓ **Quarterly metrics** reports of key library activities were instituted in 2015.

- ✓ An Annual **Statistical Trend Report** to record historical trends was started in 2016.
- ✓ **Annual Report on Partnerships** which focuses on how HPL is supporting key community initiatives and expanding our impact in a sustainable way through partnerships was instituted in 2015.

DEVELOPMENTS IN COLLECTIONS

Significant developments in digital collections have occurred over this strategic planning period, including:

- ✓ **Zinio** eMagazines service was added in 2012.
- ✓ In 2013, HPL became a Beta partner for **Hoopla** digital collection which offers customers immediate access to digital content with a cost per use model. Since its initial release as a music and movie platform Hoopla has evolved to include a variety of formats including comics, eBooks and eAudiobooks.
- ✓ **Freegal's music streaming** service was added to the Library's digital collections in 2014.
- ✓ **Lynda.com** was added to the Library's digital collections in 2015. The tutorials in Lynda.com have been used to support HPL's Makerspace and Digital Media Labs.
- ✓ In 2015, HPL became an early adopter of Zepheira's BibFrame project. The **Library.link.Network** linked data project has exposed HPL's rich catalogue data to the web.
- ✓ In addition to digital collection initiatives, this strategic planning period has included key promotional projects and the expansion of the use of BiblioCommons list features to promote library collections. Popular initiatives included the **100 Books to read before Kindergarten** list, the **Canada 150** booklist and the **Hamilton Reads** program.

DIGITAL STORYTELLING PROJECT

To support the City's culture plan, in 2014 we successfully applied for and received \$150,000 from the Hamilton Future Fund for our Digital Storytelling initiative. The Love your City, Share your Stories project was a partnership with McMaster University Library and the City of Hamilton's Culture Division. This legacy project will continue to grow by creating digital stories about Hamilton's past and present. We are integrating this project with our Local History and Archives digitization and our media relations strategy.

DEVELOPMENTS IN TECHNOLOGY

There have been a number of technology advances during this strategic plan. Technology continues to provide opportunities to gain efficiencies, shift to higher value work, enhance existing services and provide new areas of service. Key developments include:

- ✓ In 2015 the **Public Computer Renewal** project saw all public computers updated and included in a Virtual Desktop Infrastructure (VDI) environment. This provided the public with more reliable access while gaining efficiencies in reduced support and trouble shooting. In 2016 there was a significant renewal of staff computers.

- ✓ **Digital Media Labs** were established at Red Hill and Terryberry in 2015. In 2016 the **Central Circuit 4.0** opened with a Makerspace, Digital Media Lab, Recording Studio and Greenroom. Advanced Digital Media equipment has also been introduced as part of system-wide programs.
- ✓ **Self-check technology** has been updated along with enhancements to the existing **sorters**. In 2015 new sorter systems were installed at Red Hill and Westdale.
- ✓ The **Integrated Library System** (ILS), Polaris, was implemented in 2016. The new ILS has been well received by staff due to its ease of use and had a positive impact to the public such as reducing holds time.

DEVELOPMENTS IN LOCAL HISTORY AND ARCHIVES

This past strategic planning period has been a key one for **Local History & Archives** (LHA). Over the course of the last several years, the department staffing structure has evolved with a dedicated Manager of Local History & Archives and the creation of Digitization Technician positions.

- ✓ In 2014 Local History & Archives became an approved member of **Flickr Commons**, a global photo archives.
- ✓ Starting in 2013 LHA has been producing **online videos** as part of the Historical Hamilton Videos series highlighting James Street North, Gore Park and VE Day.
- ✓ The Local History & Archives **micro-site** was developed in 2015 as part of the website redesign to showcase the Library's rich local history and archival collections.
- ✓ In 2016, the open source, **Archive Management System AtoM** was implemented to manage the collection and provide digital access to archival descriptions and finding aids.

DEVELOPMENTS IN YOUTH SERVICES

To support the Library's strategic plan, Youth Services has continued to evolve core library programs for children and teens:

- ✓ The **Summer Reading Program** was redesigned in 2012 to integrate online components.
- ✓ The **Class Visit Program** was redesigned in 2014 to align with inquiry based learning and the Ontario curriculum.
- ✓ The **Storytime Every Child Ready to Read** was renewed in 2014. Digital literacy has been integrated into core programs including the use of tablets in storytimes and a STREAM (Science /Technology/ Reading/ Engineering/Arts and Mathematics) focus to programming.
- ✓ The 20th Anniversary Gala for the teen **Power of the Pen** writing program was held in 2015.
- ✓ In 2016, we implemented an **outcome based survey** for our storytime programs. Program and service development has evolved to integrate outcome measurement and evaluation while ensuring our programs and services for our youngest customers are fun, engaging and help nurture a lifelong love of reading and learning.

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.

INTRODUCTION

We know that the engagement of staff in developing services and helping build the future of library service is critical to our success as an organization. The 2009 plan had Strengthening our Organization as one of the priorities. The new priority A Creative and Changing Organization is reflective of the two key facts: that many of the key challenges faced by HPL as an organization in the first decade after amalgamation had been addressed; and community needs, especially around changing technology, are evolving rapidly and this means the skill sets that staff needs to help customers will continue to change.

CUSTOMER SERVICE DEVELOPMENTS

Identifying and removing barriers to library service and improving the customer experience continue to be a major focus of our efforts. Some key developments in this area include:

- ✓ In February 2014 the Library Board approved the creation of a new category of library card, the low barrier **Access Card**. This new card type, which was expanded to include a Children's Access Card in 2015, has been effective in re-introducing individuals to library service and has increased accountability for computer users.
- ✓ The Library adopted a **Service Commitment** in 2015 emphasizing that our top priority is to ensure a positive experience for our customers. The former *Rules of Conduct* were re-stated to emphasize mutual respect and clarify expectations.
- ✓ In 2016 all public service staff teams attended **Customer Service sessions** focussed on strategies to ensure positive customer experiences while providing exceptional service.

LABOUR RELATIONS

One important indicator of effective staff engagement is good labour relations. HPL administration continues to ensure open and honest dialogue with CUPE 932. While we do not always agree on issues, we work to address concerns where we can. Also, we ensure that changes that we need to make are well understood and effectively communicated in advance.

- ✓ Four year contract for the period January 1, 2013- December 31, 2016 was ratified in 2013
- ✓ Four year contract for the period January 1, 2017-December 31, 2020 ratified February 15 2017

STAFF DEVELOPMENT AND TRAINING

Keeping staff skills current continues to be an ongoing focus of HPL. In 2013 staff discussions were held system-wide about ways we could better fulfil our Mission and the Strategic Priorities. Staff development and training emerged as the single most important theme. Out of this a new strategy was developed that recognizes the challenges library staff face within a creative and changing organization, including evolving work environments, the need for flexible access to learning, the impacts of new and emerging technologies and tools, and the desire of individuals to create and follow personalized career development and learning paths. Key developments in this area include:

- ✓ Internal **learning programs** were reviewed and renewed beginning in 2014. A series of Learning Institutes were developed to upgrade staff’s skills and provide opportunities for internal career advancement. **Learning Institutes** that have been developed include: Customer Service, Collections and Information Services, Digital Literacy, Health and Safety, Leadership, On boarding, Programming and Adult Services, and Youth Services.
- ✓ Each year an annual **Staff Development Day** has been held.
- ✓ In 2016 Training was developed to support ‘**lean thinking**’.
- ✓ **Health and Safety** training and systems have been enhanced.

POLICY DEVELOPMENT

Consistent standards of service and processes that comply with relevant legislation require a sound foundation of policies. During the course of this strategic plan a lot of work has been done to build on the existing body of policies. Some key accomplishments during this period include:

- ✓ The creation of a consolidated Library Board Policy Manual.
- ✓ The Library Board By-Laws were revised and updated in 2016.
- ✓ A new policy template has been adopted.

EFFECTIVE MANAGEMENT OF PUBLIC FUNDS

To flourish as a public library today we need to both effectively execute on our mission while also being fiscally responsible. During the term of the strategic plan the Library Board has submitted budget submissions that in most years have met Council targets while new community needs have still been addressed. In 2011 the Library Board submitted a budget request of 0.7% when Council direction was 2%. In 2017 the direction was 1.8% and the Library Board has submitted a budget that meets that target.

Budget Year	Council Direction	Library
2012	0.0%	1.0%
2013	0.0%	0.0%
2014	0.0%	0.2%
2015	-----	1.5%
2016	1.0%	1.0%

Other items of note related to fiscal management:

- ✓ Consistent clean audits of Library finances have been reported.
- ✓ The overall staff complement has not grown. 2017 FTE count is 305, down from 309 in 2014. Meeting new service demands such as: the Central 4th floor, opening Turner Park on Fridays, expanded hours at Lynden and Waterdown and expanding learning programs have been met by internally reallocating staff.
- ✓ In-Person visits have increased to 3.95 million in 2016 and circulation of materials has remained steady at 6.74 million.
- ✓ Program attendance has grown from 123,059 in 2012 to 174,290 in 2016. Computer and wifi sessions have grown steadily during this time.
- ✓ Grant funding continues to be maximized at about \$1.2 million per year. While the Provincial Operating Grant has remained steady, it has not been indexed for inflation.
- ✓ No operating deficits were reported. Surpluses have been transferred to Library Reserves to help fund future operating and capital projects.
- ✓ The Donations, Sponsorship, & Fundraising Policy was updated in 2016.