

HPL PLANNING FRAMEWORK

Updated July 2023

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OVERVIEW TABLE OF KEY PLANNING DOCUMENTS

MISSION STATEMENT	Freedom to Belong and Discover	LONG TERM
VISION STATEMENT	A vibrant and welcoming community place where people learn, connect, share and discover.	LONG TERM
CORE VALUES	<i>What we value, how we shape our work</i> Accountability - Inclusion Innovation - Intellectual Freedom - Respect	LONG TERM
STRATEGIC PRIORITIES	<i>Where we are going, developing priorities</i> Connecting to Community Relevant and Responsive Learning Organization	LONG-MEDIUM TERM
ANNUAL LETTER FROM LIBRARY BOARD	<i>The Library Board provides a letter of direction to update the context of the Strategic Plan</i>	ANNUAL
KEY REPORTS/ POLICIES	<i>Frameworks for success</i> Working with Us Policy Facilities Master Plan Meeting Community User Needs Reports	LONG-MEDIUM TERM
BUSINESS PLANNING PROCESS	<i>Annually we submit a multi-year business plan to the City of Hamilton. Each year we outline what we are going to do in the annual business plan.</i>	1 – 3 Years

2023 LETTER FROM THE LIBRARY BOARD

February 15, 2023

On behalf of the 2019-2022 Library Board we would like to extend a warm welcome to the newly appointed Board members. As part of our Strategic Planning process, the Library Board annually drafts a letter to provide updated context for staff and Board members to consider in the coming year. During transition years like 2023, where a new Board will be appointed, we use this document as a legacy document for the future Library Board's consideration.

HPL was founded in 1889 and has a long history of being an innovative public library leader actively engaged with the Ontario and Canadian library communities. We encourage the new Board to continue this tradition and to ensure that HPL's programs and services continue to adapt to changing needs while remaining true to our core values as a public library. As you face new challenges and opportunities during your tenure, we encourage you to work with staff to ensure the organization remains relevant and responsive. We also encourage you to continue to embrace meaningful partnerships with other aligned organizations and to work closely with your municipal partners.

Over the last 15 years, the Library Board has been very successful at getting major capital projects funded to update all our locations to modern accessibility standards. We encourage the Library Board to continue to work closely with City Council to ensure capital and operating budgets are adequate to support the growth of our impact, while also being respectful of the many other financial challenges facing Council. We encourage the new Library Board to actively work with library associations like the Canadian Urban Library Council (CULC), the Canadian Federation of Library Associations (CFLA) and the Federation of Ontario Public Libraries (FOPL) to seek adequate funding from higher levels of government. We also encourage participation in efforts to advocate for policy and legislative changes around Copyright and adequate access to eBooks.

Much of this Library Board's term has been dominated by the challenges presented by the global COVID-19 pandemic that started in Q1 2020. HPL was prepared with a pandemic emergency plan already in place and was able to articulate a clear vision that focused on addressing the public health crisis as top priority while providing as much library service as could be safely provided. Library staff stepped up to deliver service while under a lot of restrictions and supported key public health initiatives including supporting testing and vaccinations. HPL's effective pandemic response has been well received by the community.

Like many other organizations, since 2020 HPL has experienced a larger than normal number of staff retirements and resignations. In addition, the process of hiring and onboarding new staff was a challenge, especially when public health restrictions were in place. In 2022, as public health restrictions were being phased out, HPL began the process of reintroducing services disrupted by the pandemic. This included expanded and more consistent library service hours and restarting in-person events.

Working throughout the pandemic has been stressful for many, especially when interacting with frustrated people angry about public health restrictions like wearing a mask. While recruitment of vacant positions continues to progress, a larger than normal rate of illness this winter has contributed to staffing strains. The Board has encouraged the leadership team to focus on staff wellness, getting new staff in place and ensuring effective procedures and training are in place while at the same time

taking a gradual approach to ramping up activities like library programs and events. We anticipate the last half of 2023 to see a return to more normal levels of activity.

Public libraries have a unique ability to develop relationships with a wide spectrum of people and our natural place is one of quiet leadership, helping people feel a part of their community and being comfortable with people that are different. As we face a lot of unknowns in the years ahead, we should embrace the challenge of working with others to contribute to civic renewal and strengthening social cohesion. Polarization undermines constructive dialogue, and we should embrace opportunities for meaningful conversations that bring us to deeper mutual understandings.

The new Board will have a recently updated Strategic Plan. We encourage you to embrace the direction presented in the plan. While under your stewardship, we hope that you will build on past work to ensure HPL remains relevant and creates spaces and services the community is proud of. HPL's commitment to inclusion should be integrated into everything we do, intentionally reaching out to ensure we include diverse voices and perspectives.

Diversity will continue to be emphasized in the makeup of the Board to truly reflect the diverse Hamilton community. While HPL has focused on Indigenous Reconciliation, we as a Board recognize we can and should do more; advocacy and purposeful support is needed to continue this meaningful work.

HPL BOARD STRATEGIC PLAN 2023-2026

Approved May 17, 2023

INTRODUCTION

This updates Hamilton Public Library's strategic direction for 2023 to 2026. As Staff work with the Library Board, Council and other stakeholders to advance these priorities, we will be mindful of the urgency and seriousness of some of the challenges our City is facing. The City has declared states of emergency around homelessness, mental health and the opioid crisis. Recent events point to the urgent need for fundamental changes if we are going to reduce risks from climate change.

Addressing these challenges requires long-term, collective action. As a trusted partner HPL is well equipped to contribute to collaborative solutions. We will face the challenges people in our community are experiencing with persistence, courage and a focus on finding common ground. We will advance reconciliation with our Indigenous neighbours as we create positive alternatives to the voices of hate, fear and division.

MISSION STATEMENT

Freedom to Belong and Discover

VISION STATEMENT

A vibrant and welcoming community place where people learn, connect, share and discover.

VALUES

Accountability - Ensuring services remain relevant and that resources are managed both effectively and transparently. We listen to the community and we communicate our rationale for decisions.

Inclusion - Creating trusted services and spaces that welcome and value everyone. We celebrate the varied cultures and histories of Hamiltonians. Equity informs our program design, so we can create fairer access to opportunities and help build a more just society.

Innovation - Anticipating and responding to changing needs and technology by continually adapting our work to remain relevant. We meet new challenges by gradually shifting resources to build capacity in areas of growing need. We are a leader in integrating sustainability into our planning and actions.

Intellectual Freedom - Providing free access to a wide range of ideas and artistic expressions. Ensuring residents have appropriate digital access and skills to flourish in the current economy and society. We nurture conversations that enhance mutual understanding and learning.

Respect - Supporting the value and dignity of all individuals. We work to support residents in overcoming the legacies of colonization, racism and other forms of discrimination.

STRATEGIC PRIORITIES

Connecting to Community

The Hamilton Public Library is a place that welcomes everyone and strives to create spaces where people feel respected and included. We will continue to be a leader in fostering belonging and enhancing mutual understanding. Our physical and digital spaces will be inviting and accessible. Our collections, programs and services will be reflective of the communities we work with. We will actively pursue partnerships with aligned organizations to increase our impact in sustainable ways.

Relevant and Responsive

The Hamilton Public Library advances our core library values as we embrace our evolving role in supporting digital access and literacy. We maintain strong physical collections as we grow digital services. Our spaces will be modern, accessible and increasingly energy efficient, as we use our operations to model sustainable solutions. We are engaged provincially and nationally as a leading library that works collaboratively to create policies and agreements that ensure fair access to copyrighted works in all formats.

Learning Organization

The Hamilton Public Library continuously seeks more effective ways to create a resilient and learning organization. Staff development is a continuous focus, so we can meet the changing societal, technology and information needs of residents. We continue to focus on reducing barriers and ensuring our services are simple to navigate. We look for new ways to do outreach and promote the awareness and use of our services.

MEETING COMMUNITY AND MEMBER NEEDS 2022: THOUGHTS ON THE NEXT DECADE

Approved March 16, 2022

INTRODUCTION

This document is the fifth in a series of reports that provide HPL with an opportunity to step back and contemplate the broader context we will be working in for the coming years. The assumptions are intended to provide context for the challenges and opportunities we will face as a public library over the next decade. The fifth version of the report updates *Meeting User Needs IV* from 2017.

For the last two years, the world has faced a once in a century global pandemic. HPL has adapted well but it has been a trying time. We update this report at a point when, for the first time in two years, it is within reason to anticipate that we will soon transition out of the pandemic phase of COVID-19.

The last two versions of these reports were completed in 2010 and 2017. In 2010 we were going through the early stages of an eBook explosion and a challenging funding environment, so considerable uncertainty about the future of the library was present. The tone in 2017 was more positive as many of the challenges posed in 2010 had been successfully navigated.

This version reveals a different kind of shift. The assumptions about what we as a public library need to do have not changed a lot, however, the context of the societal challenges we are facing seem much more urgent. The scientific consensus and recent events point to climate change being an urgent threat that needs collective action on a massive scale. The horrors of Canada's residential school system are a stain on our country and were able to happen because many Canadians remained ignorant of the systemic racism underlying Canada's relationship with Indigenous peoples. The voices of racism, hatred of people with different beliefs, orientations and identities seem louder today and more widespread. In Hamilton, like elsewhere in Canada, the toll of increasing income inequality, mental health problems and drug addiction are more acutely felt today than at any time in recent memory.

Vartan Gregorian, the President of The New York Public Library from 1981-89 was one of the most respected library leaders of recent decades. He helped restore NYPL from a deep fiscal and morale crisis. Gregorian called public libraries "*Acts of Civic Renewal*". Although much about what we may face in the coming decade may not be clear, the need to work with others to contribute to *Civic Renewal* is no doubt urgent and should be interwoven into all our work.

ASSUMPTION #1: WITH MORE 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 THE COMMUNITIES WE WORK WITH.

More rapid change is coming. The underlying question we will need to ask is: How can we as a Library be a constructive force that helps individuals and the community adapt and thrive in a rapidly changing world? HPL's long-term health will be dependent on both the success of the City of Hamilton and our ability to contribute to that success.

The challenge of climate change is no longer a future threat, its impacts are already visible. HPL will need to show leadership in doing our part to decrease the carbon footprint of our operations. We

should also be a part of a broader effort to help residents understand their role in getting on a more sustainable path. As we transition away from fossil fuels, we have an opportunity to use our experience to educate youth and others about environmental issues. For example, we should commit to transitioning our bookmobiles and delivery vans to electric as soon as we reasonably can and using those to promote sustainable solutions.

The population of Hamilton is expected to see strong growth in the coming years. Effectively engaging a growing senior's population is a potential opportunity that we should not miss. Ensuring our facilities are located where people live will require ongoing focus and long-term planning. The LRT has the potential to see increased population growth in the lower City that might create new opportunities to locate libraries near densely populated areas.

In the last decade we have seen significant changes in technology that have impacted how we deliver content and services. The global COVID-19 pandemic has further accelerated technology change and drawn attention to the fact that many in our community do not have adequate access to Information and communication technologies (ICT). Ensuring Hamilton is a place of digital inclusion and access is one area where HPL will need to continue to focus on. Helping residents gain the knowledge and skills to utilize existing and emerging technologies should be an ongoing focus. Well-designed partnerships will be important to ensure we are able to embrace this challenge.

Resident's 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 risk losing their engagement. 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 members changing needs. As members 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. We need to continue to develop and expand our research partnerships to get practical but independent expert guidance and evaluation to improve our impacts and tell our stories. Our primary emphasis will need to be on making persistent incremental changes, however, when circumstances dictate, like during the pandemic, we will need to be ready to embrace big challenges and opportunities.

Looking forward, we should expect other changes in technology, society and the environment that will create future disruptions (some positive, some negative). Some we will see coming and some others we will not. 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.

ASSUMPTION #2: PUBLIC LIBRARIES ARE UNIQUELY POSITIONED TO CONTRIBUTE TO THE HEALTH, EDUCATION, PROSPERITY AND **SOCIAL COHESION** OF THE COMMUNITIES WE SERVE. TO ACCOMPLISH THIS, WE WILL NEED TO WORK IN PARTNERSHIP WITH OTHERS TO COORDINATE EFFORTS TO ACHIEVE POSITIVE CHANGE THAT ADDRESSES STRUCTURAL OBSTACLES THAT PREVENT PEOPLE FOR REALIZING THEIR FULL POTENTIAL.

The *Truth and Reconciliation Commission of Canada*, the *National Inquiry into Missing and Murdered Indigenous Women and Girls* and the discovery of multiple unmarked graves of children at residential schools have shed light on the multi-generational systemic racism Indigenous people in Canada have faced. Advancing the *Calls to Action* in collaboration with our Indigenous friends and allies needs to be a major focus of the next decade and beyond. Libraries have a special role in educating people about the truth of what happened and of helping both Indigenous and non-Indigenous Canadians learn about the rich cultures and histories of the people that lived in this area for thousands of years. As libraries continue our work welcoming new Canadians, we also need to expand our efforts with Black, Indigenous and People of Colour (BIPOC), to end racism and discrimination. The fact that public libraries work with people of all ages, backgrounds, orientations and economic circumstances creates a unique opportunity for us to help people get to know each other and to be a force of advancing understanding and empathy. Libraries will need to show leadership and be thoughtful in our approaches to ensure we bring the whole community forward.

Public libraries play a supporting role in advancing the education, culture and health of the communities we serve. The pandemic has disrupted the education of many young people, with those with the least resources often being impacted the most. Supporting student success and residents lifelong learning will be necessary for our community's long-term economic success. We need to recognize that we can contribute more to good outcomes when 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. Building off our successful Researcher in Residence partnership with McMaster we should look to create additional positions to help support library operations and ensure we have the expertise and ongoing engagement and alignment with key partners to address critical priorities. Developing new partnerships to renew and continue our Community Resource Worker program is a high priority as is having an Elder-in-Residence to expand our work with the Urban Indigenous Strategy.

If political discourse continues to become more polarized in the next decade, we should anticipate an increase in challenges to intellectual freedom. Libraries will need to defend against efforts to limit access to diverse points of view. Increasing civic engagement and working with others to ensure we can have meaningful debate and discussion will be important to protect democratic norms. We should engage as many as we can in a shared respectful dialogue and cultural experiences that advances mutual understanding and empathy. Making equity and inclusion a reality requires HPL to ensure we design services and programs in ways that fosters this. In engaging in these efforts, we need to use proven approaches, like the Intercultural Development Inventory (IDI), to ensure we are thinking and talking in ways that invites people that may have different perspectives, instead of driving them away with divisive language and approaches.

ASSUMPTION #3: 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.

The perception and support for public libraries in Canada generally and in Hamilton specifically is positive. While our work has helped us nurture strong support from City Council, we should not ignore the significant budget pressures that City Council will face in the coming decade. The provincial and federal governments also face budget pressures but municipal governments which are the primary funder for public libraries in most of Canada are the most challenged due to how they are able to raise funds. 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. Although long-term growth may create some opportunities for increases in core funding and staffing, we cannot assume that will be easily achieved. First, we will need to demonstrate an ongoing commitment to meeting emerging needs by continually internally adjusting our resources and utilizing innovation to shift to work of higher value. Where possible, we will need to complement our core municipal funding with other sources of revenue. Working with key associations to get greater long-term funding from higher levels of government will be an ongoing effort.

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 #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.

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.

The growth of digital access in recent years has been strong. During the pandemic when physical access to our physical spaces was limited, we saw a strong and rapid uptake in usage of HPL's digital collection. Being able to adapt to providing content in digital form has been important for libraries as some people have embraced the shift to digital. Despite this success, several serious challenges to digital access remain for public libraries. The cost and terms which publishers make eBooks available to public libraries are unfavourable and limit our ability to provide access. Another challenge is the lack of control public libraries have over the digital platforms that our content providers use. Libraries,

including HPL, have made some progress at making digital content accessible through the Library catalogue, however, the convenience and experience of using the platforms directly make them a preferred option for many. HPL will need to continue to be engaged nationally on this issue with other libraries to both advocate for better terms and work at improving our ability to control how that content is presented. As we advocate for those changes, we also need to embrace alternative solutions, like Controlled Digital Lending (CDL), that enable us to preserve our collection and expand access.

Services such as Amazon Prime, Netflix, iTunes and Audible demonstrate that the private sector can successfully provide consumer 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. Our work should align and complement the City Museum's strategy and engage other cultural organizations in Hamilton.

ASSUMPTION #5: NETWORK SECURITY, PRIVACY AND INTELLECTUAL PROPERTY ISSUES WILL BECOME MORE CHALLENGING AND COMPLEX. 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.

APPENDIX I – COMPARISON OF 2022, 2017 AND 2010

The table below shows the core assumptions adopted in 2010 and 2017. Although the explanatory text has changed a lot in 2022, only two changes are being made to the assumptions themselves. *Social cohesion* has been added to the assumption about our unique role and the funding challenge assumption has been moved to #3, it was previously listed as #2 in 2010 and 2017.

2017 Assumptions, 2022 Amendment	2010 Assumptions
<p>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.</p>	<p>1. Our very survival as an organization is dependent upon us remaining relevant and vital to the lives of people.</p>
	<p>5. Current services and processes will continue to change repeatedly.</p>
	<p>6. Future jobs will be less repetitive and will focus more on public service.</p>
<p>2. Public libraries are uniquely positioned to contribute to the health, education, prosperity, and social cohesion of the communities we serve. To accomplish this, we must continue to develop successful partnerships and actively participate in broader community initiatives.</p>	<p><i>No similar assumption stated in 2010.</i></p>
<p>3. 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.</p>	<p>2. All of our funding is vulnerable.</p>
	<p>3. More library buildings require renovations than our funding will allow</p>
<p>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 the unique local content held and made accessible by HPL will become increasingly important.</p>	<p>4. Electronic material will soon form a significant portion of our circulation.</p>
	<p>7. Competition from the private sector for services we once considered our exclusive domain will continue to increase.</p>
<p>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.</p>	<p>8. Privacy/intellectual property issues will become more complex</p>

REFERENCES

- Documentation related to the **Strategic Plan** and its development <https://hpl.ca/articles/strategic-priorities-2023-2026>
- **Key Reports** from HPL <https://hpl.ca/articles/key-reports>
- **HPL Policies** <https://hpl.ca/articles/hamilton-public-library-policies>
- **Annual Reports** <https://www.hpl.ca/articles/annual-report>