



HPL Strategic Planning Framework

June 2019 - Paul Takala, Chief Librarian/CEO

Introduction..... 1

Planning Overview..... 1

Mission and Values..... 2

Strategic Priorities 2018-2021..... 2

2019 Letter from the Board..... 3

2018 Letter from the Board..... 4

Meeting User Needs IV – Thoughts on our Next Decade..... 5

Introduction

This document provides an overview of HPL’s strategic planning process. The current strategic plan was approved by the Library Board in February 2018. The core mission statement and values have been in place since 2005. The definitions of the values were updated in 2018. In adopting the current plan, it was decided that each year the Library Board would issue an annual letter that provides high level guidance to staff for the coming year. The 2019 letter is also intended to provide legacy advice from the last Library Board to this one.

Planning Overview

OUR MISSION Why we exist	Freedom to Discover	LONG TERM
SHARED VALUES What we value, who we are	Intellectual Freedom Inclusiveness Innovation Respect Accountability	LONG TERM
KEY REPORTS	Facilities Master Plan Meeting User Needs	LONG/MEDIUM TERM
STRATEGIC PRIORITIES Where we are going	Community Beacon Relevant and Responsive A Learning & Innovative Organization	MEDIUM TERM
BUSINESS PLANS How we will get there/ what we will do	Projects/actions that help realize the strategic priorities.	SHORT/MEDIUM TERM

Mission and Values

(Approved 2005, Revised 2007, 2018)

Mission Statement

"Freedom to Discover"

Values

- **Intellectual Freedom** – Provide equitable access to and support for knowledge and creativity.
- **Inclusiveness** – Support inclusion by creating trusted services and spaces that welcome everyone.
- **Innovation** – Anticipate and respond to changing needs and technology.
- **Respect** – Support the value and dignity of all individuals.
- **Accountability** – Ensure that library services remain relevant and vital and that resources are managed effectively and ethically.

Strategic Priorities 2018-2021

Community Beacon

The Hamilton Public Library will be a source of pride in the community. The library system will act as a unifying force by welcoming everyone. Our physical and digital spaces will be inviting and accommodating. We will be a leader in fostering community engagement and participation.

Relevant and Responsive

The Hamilton Public Library will continue to advance core library values as we embrace our evolving role in supporting access and literacy. We will support people in their lifelong learning journey by helping them thrive today as they prepare for tomorrow. We will maintain strong physical collections as we grow digital services. We will be a national library leader, working collaboratively to create policies and agreements that ensure access to intellectual property in all formats.

Learning and Innovative Organization

The Hamilton Public Library will continuously seek new ways to assist the learning and growth of all individuals. The library will support staff to be engaged in their roles and in the library profession. We will provide staff with opportunities to continually enhance their skills and develop new competencies, so they can meet changing technology and information needs. We will focus on ensuring we reduce barriers to using our services as we promote awareness of the Library in the communities we serve.

2019 Letter from the Board

January 2019

On February 21, 2018, the Library Board adopted a new Strategic Plan for the period 2018-2021. That plan was built on a strong foundation of research and community engagement. We encourage the new Library Board to take time to understand the context with which that plan was developed and understand some of the longer-term opportunities and challenges that face public libraries in the 21st Century.

Much was accomplished during the previous strategic plan and we anticipate the new Library Board will ensure that HPL continues to remain relevant to the communities we serve. During this term, 2015-2018, the Library Board has enhanced its annual business planning process. That process aligns with the City of Hamilton multi-year business plan process and will be an important tool for the Library Board to direct the discretionary efforts of the organization.

From our extensive community outreach to develop the Strategic Plan, we learned that there is a high level of satisfaction with HPL and that there is strong community alignment with the values we are committed to as a public library. We hope the new Board will continue to build on the work we have done to improve library service hours, programs and spaces.

We see that more work needs to happen around improving awareness of library services and breaking down barriers to using HPL. One issue that was a point of discussion of this Board was how the Library Board should address issues like library fines that in some cases cause barriers to residents. We were unable to reach consensus on this issue and advise the new Board to carefully examine the implications of changes to the fines structure and take a step-by-step approach, ensuring that the implications of changes are understood.

As HPL strives toward increasing its positive impact we hope the new Board will ensure that past successful strategies will be applied to new opportunities and challenges. This includes continually working towards measuring the value of work and basing service decisions on research and collective impact. It means meeting new priorities by shifting current resources and using technology and process changes to improve how the work is done.

The Board is proud that HPL is an internationally recognized innovative leader. HPL will continue to adopt new technologies and seek out new services and partnerships to more effectively serve our communities. Through these priorities we will continue to be forward-looking, responsive, and accountable. We wish the new Library Board every success!

2018 Letter from the Board

February 2018

In preparation for developing the 2018-2021 Strategic Plan the Library Board sought to understand broad trends impacting society and public libraries, as well as, specific challenges and aspirations of the communities we serve. The Board looked at the *Our Future Hamilton Community Vision* and conducted a community survey that received over 7,000 responses. That process has informed the new Strategic Plan and the annual business plans that will follow.

The community has told us that there is a high level of satisfaction with HPL and that there is strong alignment with the values we are committed to as a public library. We also learned that we could do a better job of informing people about our services and that there are groups that we could better serve. As we continue to improve our service hours, programs and spaces we will focus on breaking down barriers to use. We will also focus on improving access to collections, in particular our selection of eBooks.

As we strive toward increasing our positive impact, the Library Board expects that we will continually work towards measuring our value and basing service decisions on research and collective impact. We will meet new priorities by shifting current resources and using technology and process changes to improve how we do our work. Staff will use the annual business planning process as a way to identify new opportunities to meet the Board's priorities.

The Board is proud that HPL is an internationally recognized innovative leader. HPL will continue to adopt new technologies and seek out new services and partnerships to more effectively serve our communities. Through these priorities we will continue to be forward-looking, responsive, and accountable.

Meeting User Needs IV – Thoughts on our Next Decade

June 2017, Hamilton Public Library Board

Introduction:

In June 2010 the former Chief Librarian/CEO, Ken Roberts, completed a document called [Meeting User Needs III – Thoughts on our Next Decade](#). That document helped inform the strategic planning process and helped challenge staff to remain focused on ensuring library service continues to evolve to meet new and emerging needs. As part of developing the new strategic plan we have identified the importance of updating the document. The following document **Meeting User Needs IV – Thoughts on our Next Decade** provides several high-level assumptions to assist with our longer-term planning.

The eight challenges listed in 2010 have been combined into five. Before listing the new challenges and the explanatory statements, the 2010 assumptions have been listed beside the 2017 assumptions. The updated assumptions reflect the reality that we have made significant progress towards addressing the challenges identified in 2010. For example, assumption #3 from 2010 stated: *“More library buildings require renovations than our funding will allow”*. Given the progress we have made towards facility renewal since then, the assumption has been updated to reflect a reality that while still challenging is less ominous. In general, we have attempted to update these to be realistic, balancing the challenges public libraries face while recognizing our strengths and the opportunities the changing environment presents us. A final point to make is in the last 15 years the need for HPL to meet new needs and demands without expecting an increase in our overall funding from the City of Hamilton has become better understood and integrated in our planning. The update assumptions reflect that fact.

2010 Assumptions	2017 Assumptions
1. Our very survival as an organization is dependent upon us remaining relevant and vital to the lives of people.	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.
5. Current services and processes will continue to change repeatedly.	
6. Future jobs will be less repetitive and will focus more on public service.	
2. All of our funding is vulnerable.	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.
3. More library buildings require renovations than our funding will allow.	

	<p>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.</p>
<p>4. Electronic material will soon form a significant portion of our circulation.</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>7. Competition from the private sector for services we once considered our exclusive domain will continue to increase.</p>	
<p>8. Privacy/intellectual property issues will become more complex.</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>

2017 Assumptions – Meeting User Needs IV

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 complement 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.