

**Transition Board for the
New City of Hamilton**

Library Task Force Report

Gathering Strength — Foundations for Public
Library Service in Our *New City*

June 2000

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Executive Summary

Hamilton's amalgamated public library system will demonstrate that the new city can and will improve services, immediately. The three current public library systems serve more than 260,000 people at 26 branch locations. Each local library branch is the only municipal service many residents see in their communities and neighbourhood. The spirit of cooperation that has already developed amongst the three current library systems will allow us, by January, to provide a common library card, a common catalogue, and an ability to deliver desired library material to a person's local branch. We will be one library system by January 2001.

Early in the new year we will extend outreach services throughout the entire city so that residents in senior's homes gain bookmobile service near their door and so that citizens with disabilities can have library material delivered to their homes by volunteers.

We plan to use our strong public support to help the new city deliver services in an alternative manner. The library is aware of recommendations being made by the Municipal Services Centre Task Force and supports the concept of using library computers and staff as access points to local government.

The new City of Hamilton Public Library system will, within the first year of operation, provide increased remote access to electronic products, work with our school board partners and with Hamilton Hydro to extend high speed telecom access to rural areas, and provide stronger children's services to all residents of the new city. We will increase the use of electronic products at all locations through the use of grants from both the federal government and the Bill and Melinda Gates Foundation.

We hope the new library card that almost 60% of Hamilton residents will receive can show that our citizens live in a city that intends to be innovative, cooperative, and efficient. The new library card can be a citizen's library card used to access many municipal services. We recommend that the library Transition Team on Smart Cards work with representatives from Culture and Recreation, Transit, Social and Public Health and Municipal Service Centres in order to develop a library card that can also double as a city services card, allowing people to register for programs, ride buses, and park their cars through use of a single card.

Even if there were no increases in staffing levels, the new library system will cost more money. Wentworth Libraries is under a provincial order to raise its salary levels to those of the Hamilton Public Library. Salary unification will come more quickly once the libraries amalgamate. Wentworth will also lose the provincial subsidy for salaries it has been receiving. Knowing that budget is a concern, we reluctantly propose using alternative mechanisms to deliver services to three neighbourhoods where branch libraries currently exist. We also propose closing four neighbourhood bookmobile stops, allowing the bookmobiles to concentrate on people with special needs.

The Task Force has relied heavily upon the staff of all three library systems and has, whenever possible, included staff in our discussions. We researched the literature, seeking best practices throughout North America. We are confident that the recommendations in this report can help the new city to strengthen the excellent library services its citizens have come to expect.

Introduction

The Library Task Force's commission from and for the Transition Board varies somewhat from that of other Task Forces. Overall, in the *Guide to Staff Involvement in the Transition Process* the Library Task Force was directed to use the "existing taskforce". This is an important difference that has both affected and enhanced our work and allows us to recommend an almost seamless implementation plan.

The Dundas Public Library, Hamilton Public Library and Wentworth Libraries can build on broad and long-standing communication and cooperation. All three are members of HWIN (the Hamilton-Wentworth Information Network) and its cooperative ventures. We share common Internet access and cooperate on the purchase of licensed electronic information products. Two of the libraries have had a reciprocal borrowing arrangement in place since 1998 and also shared the purchase and use of a web server to provide remote home access to the two library catalogues. While it would be almost impossible to choose three public library systems in Ontario that are more diverse, we have a head start that is envied by the public libraries in other amalgamating municipalities.

The three Chief Executive Officers (CEOs) of the libraries met last January to begin planning for 2001. A formal transition planning process was established before the creation of the Transition Board's Library Task Force. All three public library boards endorsed that process last February and it was announced to library staff. Last March, all employees of the three libraries attended one of a series of joint seminars and a similar seminar was held at a joint session of the three library boards. Guest speaker Gabrielle Lundeen, one of the six Chief Librarians who worked through the Toronto Public Library amalgamation, shared her experience in a presentation entitled, *Gathering Strength*.

The Library planning process is outlined in some detail in **Appendix 1** to this Report. A Transition Coordinating Committee consisting of the three Chief Executive Officers of the library systems leads the process. The Coordinating Committee has established some eighteen joint staff Transition Teams to work on specific tasks. Our priority is to make public library use barrier-free for residents across the new city from the very first day of business, January 3, 2001.

Library Mandate

Vision

In our vision for the *New City of Hamilton Public Library*:

Residents have the information, literature and record of human experience

- To grow and be refreshed in character, spirit, energy and ideas.
- To pursue their hobbies, enthusiasms and interests as continuous, life-long learners.

Residents have ready access to electronic information technology resources

- To provide them with up-to-date information for personal, family, civic and work or school responsibilities and decisions.

Residents have easy access to information about their local government and its processes

- To participate fully as citizens and to help in building their community.

Residents recognize in their local library a community icon and public place

- That establishes their connection to their community and to their local government, and gives a sense of community pride.

Mission

MISSION STATEMENT

The Mission of the New City of Hamilton Public Library is to provide equitable access to timely, accurate information and to the cultural record.

Availability is Not Access

A key phrase in the mission statement and an essential principle for the Task Force in all of its deliberations was "equitable access".

The speed of change in information technology and the astonishingly rapid adoption of the Internet by the general public have led some to speculate that libraries are no longer necessary. In fact, the opposite is true. Our customers expect public libraries to continue to provide all of the traditional library services and add all of the new information technology based services as well.

Library public service staff continue to organize information for effective access and use; they evaluate user needs to connect individuals with the information resources that meet their particular requirements. In addition, librarians are now navigation assistants, searching tutors, technology teachers and information literacy coaches.

The local public library is now the average citizen's "window to the world," providing access to resources that were unimaginable only a few years ago. This access has enhanced the importance of library services in the community, as well as increased usage for those services.¹

The advent of the Internet and information on the Web has not decreased the use of the public library. If anything, the public has turned more to the library to help them make sense of the wealth of information. The Benton Foundation study, *Buildings, Books and Bytes*, the largest independent study of public library use in the USA, found that library use, Internet use and bookstore use were interrelated. An increase in one led to an increase in all three.

Public libraries were founded to eliminate barriers to equitable access to information. In the nineteenth century those barriers arose out of the fact that books were expensive and in short supply. In the twenty-first century, the barrier to access is the overabundance of irrelevant information and the probability that well-indexed, valuable resources will require payment for access. The three public libraries are already providing some resources by licensed Internet delivery. Equitable access to high quality information resources will increasingly be the responsibility of the public library—a new version of its traditional role in the community.

Mandate

The people of Hamilton will look to the new Hamilton Public Library for services that meet their diverse and growing needs for information relevant to the decisions and challenges of their lives.

The New Hamilton Public Library:

- Promotes the shared community value of lifelong learning
- Ensures that everyone can make choices based on up-to-date, accurate information
- Supports the economic vitality of the city
- Fosters children's interest in reading
- Nourishes people who spend leisure time listening, reading or viewing

¹ Kemp, Roger L. "A City Manager Looks at Trends Affecting Public Libraries", *Public Libraries*, (March/April 1999) p. 118.

- Builds community by providing shared public spaces of shared experience
- Stands as highly visible evidence of municipal tax dollars at work.

Customer Groups Served.

The public library serves self-selected customers of all ages, matching resources with their needs individually. Its customer group includes every person in the city: 57% of residents are active library cardholders. In addition, many customers use one card for their entire family. Previous planning surveys have found that library use falls into three categories: 1/3 of all card holders use the library weekly; 1/3 use it 3 – 4 times annually; and 1/3 use it one a year. Studies have also indicated broad-based use by all demographic groups and geographic areas.

Role within the City of Hamilton

The public library has a cooperative role with other City departments in making information about city services easily accessible. It plays a part both in terms of organizing content for finding ease and in terms of public access to the information technology that will increasingly be used to deliver the services of the new city.

Public libraries are natural leaders in the development of information technology. “Library leaders have led other municipal departments in the automation of their operations and public services.”² The HWIN partnership is one example of this. Public libraries provide training for public and staff in the use of electronic information resources.

Public libraries record the historical development of the local community (e.g. Hamilton Special Collections and Dundas archives).

Public Libraries are strong community partners that can work effectively with other City Departments such as Public Health to promote literacy, an essential factor for a healthy community. The skills of public library staff are helpful to staff in other city departments. Some of these, which might not be immediately obvious, include:

- the skill to write clear language publications for low literacy audiences
- the knowledge to train staff and volunteers (e.g. Parents Helping Parent initiatives) in skills that develop literacy, and
- the skill and knowledge to use and to teach effective search strategies for electronic information resources.

² Ibid

Challenges for the New Library

SWOT Analysis

STRENGTHS
Widely dispersed, diversified locations
Electronic access
Competent, trained staff
Community partnerships (HWIN, School Board, etc.)
Owned facilities - good condition
Diversified / good collections
Hours of operation
Customer service - helping users help themselves
Public support

WEAKNESSES
Leased facilities - need improvement
Lack of staff movement
Perception of uneven service levels between systems
Telecommunications network imbalance across the region
Different pay scales

OPPORTUNITIES
Changing technologies
Consolidation speeds the balance between different service levels
Maximize use of central facility and specialized services
Partnership opportunities with government (Federal / Provincial / Municipal)
Public awareness of the need for information
Blending staff/cultures from three systems
Economic stability - blended services - increasing assessment growth
Structural changes / service delivery

THREATS
Supply less than public demand for electronic access
Rising service level expectations by the public
One time amalgamation costs
E-Publishing
Operating costs
Perception of Internet capabilities vs. library resources
Uncertain provincial funding and policies
Provincial legislation

Public Library Services Now

Service Summary

Existing Operations

The review and assessment of existing public library operations in the six municipalities was simplified somewhat by the fact that one library system provides public library service to four of the six municipalities. However, the three library systems differ markedly in their organizational culture and their style of service provision. Hamilton is a large urban system with a central library, nine branches and specialized services. Dundas is a single site, medium-sized town library; Wentworth has fifteen branches and is building suburban service on the strength of its highly distributed rural service delivery model. Two of the systems are unionized and one is not.

An overview of services as they exist now is provided in **Appendix 2**.

Map of Library Service Locations

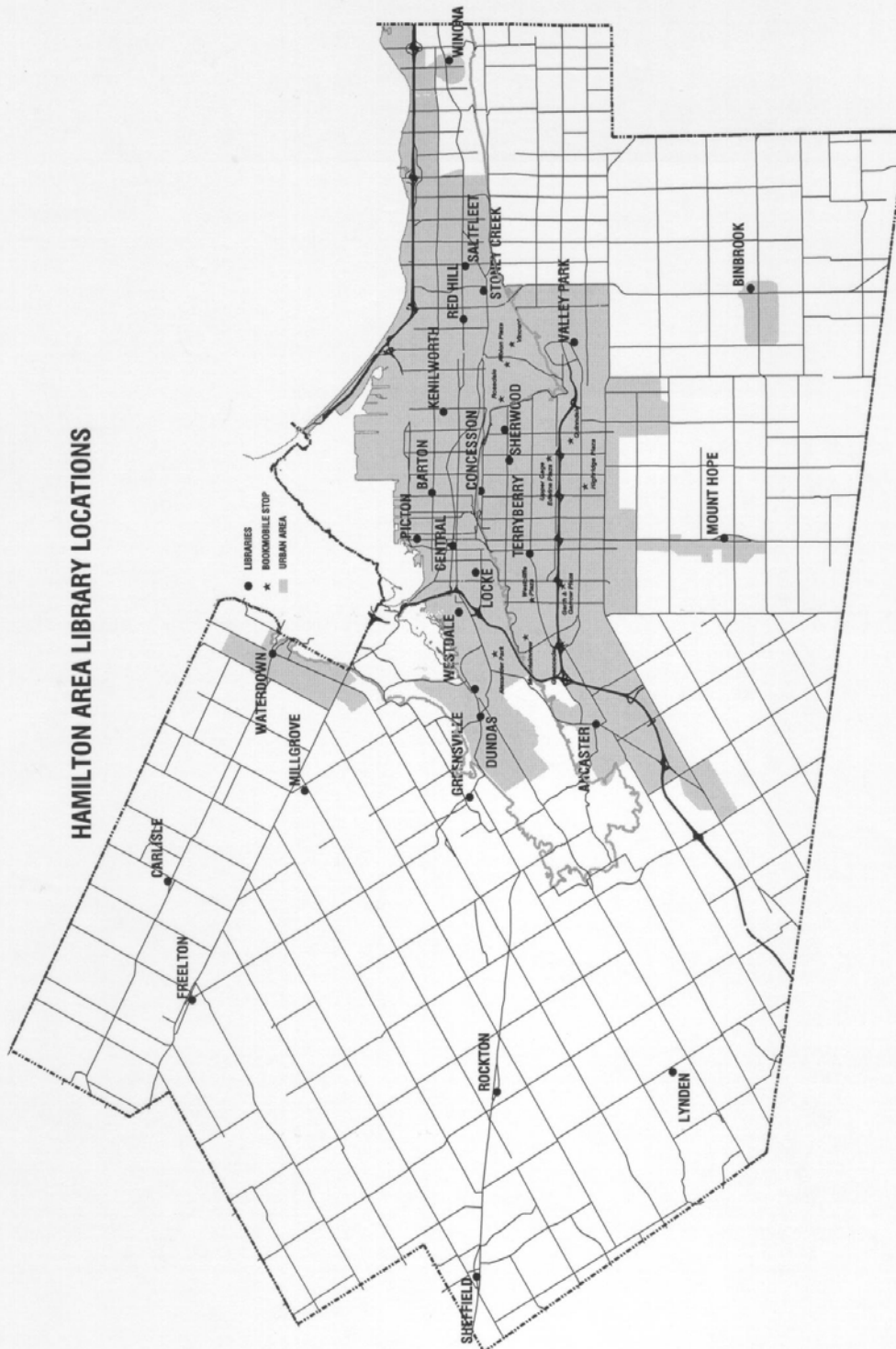
A map of the new city showing the locations of branches and bookmobile stops is included on the following page.

Infrastructure Review

The review of the existing infrastructure was relatively easy for the Task Force because of long-standing standardization in the collection of public library service information. The Ontario Ministry of Citizenship, Culture and Recreation requires submission of an annual statistical survey from all public libraries receiving grants from the province. Definitions of terms and methods for counts are standardized. The results of the survey responses for the Dundas, Hamilton and Wentworth library systems are shown in a table in **Appendix 3**. It gives a snapshot of infrastructure, resource details and budget for each of the three current systems and the total of the three combined. Information is for the year 1999.

Other findings of the review completed by the Task Force include equipment and contract inventories. These are summarized in **Appendix 4**.

HAMILTON AREA LIBRARY LOCATIONS



Public Library Service for the Future

In examining the "business" of public library service, the Task Force grappled with the fact that public libraries are highly integrated operationally. Few library services can be examined independently of one another and the same resources may be applicable to different services simultaneously. For example, a single biography title may be a school project reference source for one reader, a business inspiration to another and recreational reading to a third. A single library staff member might help identify the next title in a mystery series, teach Boolean searching in an electronic database and pursue current health information all in the space of ten minutes. What most library users identify as library services are, in fact, service delivery methods. This makes the approach of identifying Core and Non-Core services difficult.

The Task Force turned to a standard planning tool used across North America.

The Planning for Results process³ uses the concept of "Service Responses" to help in making resource allocation planning decisions. Public libraries generally have some component of almost every service response but different libraries assign resources to those service responses at quite different levels depending on the needs they find in their own communities.

Task Force members used the service response descriptions to assess how the three library systems assign resources now and then determined how resources should be assigned for the first years of the New Hamilton Public Library. Overall, Task Force members agreed that all of the service responses are core for the New Hamilton Public Library but that the allocation of resources should be adjusted somewhat for the new library system to meet city wide needs for the first years of the new municipality. The Task Force also discussed where partnerships exist now in service responses and where they might be sought and/or developed even further for better service.

The result of the Task Force discussion on Service Responses is shown in the following table.

³ Himmel, Ethel, William James Wilson with the ReVision Committee of the Public Library Association. *Planning for Results: A Public Library Transformation Process—The Guidebook*. Chicago: American Library Association. 1998.

Table 1 — Priorities for Service Responses

Service Responses	Partners	Emphasis		
		Low	Medium	High
Basic Literacy	X	√	X	
Business & Career Information	X			X √
Commons (Formal)		X √		
Community Referral (Info. Service)	X ↑↑			X √
Consumer Information		X √		
Cultural Awareness			X √	
Current Topics & Titles				X √
Formal Learning Support (high expectations)	X ↑↑		X √	
General Information				X √
Government Information	X ↑↑			X √
Information Literacy			X	√
Life Long Learning			√	X
Local History	X ↑↑			X √
Meeting Place (Informal)			X	√
Preschoolers' Door to Learning			X √	

X = The Emphasis Now

√ = Emphasis for the *New Library*

↑↑ = Seek or Strengthen Partnerships

Performance Measures

The comparison of performance information is a standard aspect of public library management generally and particularly so in Ontario. The detailed results of the Ontario government's annual statistical survey have been published and distributed to public libraries for over thirty years.

Public library managers use the data to compare performance and to find indicators of efficiencies. Use has been long-standing enough for broad understanding of the limits of such comparisons as well. A capital project can skew the reported figures of any library for a year, making comparisons futile. The most value is gained when managers scan for clues and follow up with contacts to other library systems. Valuable clues to improvement are usually at the micro, not the macro level.

The Task Force has identified some general performance measures. We expect library staff, working on Transition Teams and later as part of the ongoing management of the New Hamilton Public Library, to scan widely and at the detail level for indicators of opportunity to continue to redesign processes and improve services. The Task Force has included in its performance measures all those measures that will be required of public libraries starting in the year 2000 for reporting to the Ontario Ministry of Municipal Affairs and Housing.

Table 2 — Performance Measures

Measure	Performance Metrics
Input	<ul style="list-style-type: none"> • Budget • Staff • Total collection • Total square footage
Output	<ul style="list-style-type: none"> • Service transactions - calculated as the total of: <ul style="list-style-type: none"> • Material circulated • Number of reference requests • In library use • Electronic information use • In person visits • Percentage of collection replaced annually
Efficiency	<ul style="list-style-type: none"> • Service transactions per capita • Cost per service transaction • Cost per capita (budget dollars per capita) • Service transactions per F.T.E.
Effectiveness (Customer Satisfaction)	<ul style="list-style-type: none"> • Proportion of active cardholders in the population • Turnover rate (average annual circulation per collection item held) • Total weekly service hours at all locations (per 10,000 population) • Collection expenditure per capita • Exit survey • Customer satisfaction survey

All of the performance metrics are based on counts already reported by the three library systems. The customer satisfaction measures would be new activity for the new library. Usually, libraries do surveys on an infrequent, as-needed basis. The Task Force proposes that exit surveys be planned with regular sampling and standard questions. The exit survey would be asking library users, "Did you get the service you came for today?" A customer satisfaction survey should be administered to the population generally but it is an expensive undertaking for the public library alone. The Task Force expects that several Task Forces will propose such a survey measure.

Recommendation 1

That the New City budget for the annual costs of a Customer Satisfaction Survey of an accurate sample of the population at large, and

That the New Hamilton Public Library be included with a limited number of questions in the survey instrument.

Best Practice Findings...

The City of Mississauga and the Mississauga Public Library, using services from Environics

Benchmarking

The Task Force has chosen five library systems in Canada and three in the United States as benchmarking comparators. The New Hamilton Public Library will go through several years of transition starting in 2001 but the comparator systems in Canada should be useful for us to track over an extended period. They are Lambton County, London, Ottawa, Toronto and Vancouver, selected because of their size or because they share characteristics similar to our new library system. Performance measure comparisons for the five are shown in **Table 3**. The data used for these comparisons is for the year 1999, obtained directly from the libraries. Data definitions are from the *Annual Survey of Public Libraries* as administered by the Ontario Ministry of Citizenship, Culture, and Recreation.

Benchmarking partners outside Canada have the disadvantage that comparison of costs, especially in staff intensive organizations like public libraries, can never be comparable, even if simple dollar conversion rates are applied. However, the advantage of finding different operational methods is attractive and the striking similarities between the New Hamilton Public Library and the three American libraries selected are intriguing and worth monitoring. The three libraries, Charlotte & Mecklenburg County, NC, Multnomah County (Portland, OR) and Seattle, WA, are highly respected public library systems in progressively managed municipalities. The Performance Measure comparisons for the three U.S. benchmark partners are shown in **Table 4**.

Table 3 — Performance Measure Benchmarking—Canada

Performance Measure	Dundas	Hamilton	Wentworth	Combination of 3 Libraries	Lambton County	London	Ottawa	Toronto	Vancouver
Population	22,000	322,352	123,447	467,799	123,390	330,258	328,581	2,385,421	558,232
# Permanent Locations	1 Central 0 branches	1 Central 9 branches	0 Central 15 branches	1 Central 25 branches	1 Central 15 branches	1 Central 15 branches	1 Central 7 branches	1 Central 1 Reference 96 branches	1 Central 22 branches
INPUT									
Annual Budget (actual operating costs)	\$788,628	\$16,268,411	\$3,348,163	\$20,405,202	\$3,788,917	\$11,440,752	\$13,942,829	115,595,138	\$30,999,340
Total Staff (F.T.E.)	13.3	251	41.4	305.7	64.1	210	252.5	1773.2	479.6
Total # Items in Collection	95,050	1,080,680	384,165	1,559,895	609,567	1,093,172	1,179,262	9,162,931	2,361,044
Total Square Footage	12,905	262,628	45,359	320,892	155,990	147,304	178,347	1,705,993	458,138
# Public Access Workstations	28	375	92	495	149	460	379	2,850	500
OUTPUT									
Annual Total Materials Circulation	295,870	3,513,088	1,020,569	4,829,527	1,027,003	3,512,928	3,579,759	25,226,649	8,701,530
Annual Number of Reference Requests	26,765	600,359	150,992	778,116	154,962	544,781	647,410	3,304,164	1,140,307
Annual In-Library Materials Use	51,965	1,586,885	184,296	1,823,146	425,217	1,617,985	1,484,959	12,674,719	N/A
Annual Number of In- Person Visits	163,072	2,693,184	556,868	3,413,124	713,024	2,598,856	1,991,028	17,103,164	6,015,277
Percentage of Collection Replaced Annually	9%	7%	11%	7.9%	5%	6%	8%	4.5%	7.3%
EFFICIENCY									
Annual Number of Service Transactions per Capita	24.19	26.02	15.54	23.17	18.31	24.92	23.14	24.5	33.78
Annual Operating Costs of Library Services per Capita	\$32.38	\$49.05	\$23.66	\$43.62	\$30.71	\$34.12	\$39.45	\$46.76	\$55.53
Annual Number of Service Transactions per F.T.E.	40,015	33,421	46,366	35,459	35,249	39,187	30,116	32,958	39,325
EFFECTIVENESS									
Percentage of Population who Hold Active Cards	59%	61%	47%	57%	68%	40%	55%	60%	74%
Annual Turnover Rate of Library Materials	3.1	3.25	2.66	3.1	1.69	3.21	3.04	2.75	3.69
Weekly Service Hours per 10,000 Population	25.46	15.29	41.05	22.57	52.11	20.92	13.78	20.14	18.23
Annual Library Materials Expenditure per Capita	\$3.88	\$5.20	\$4.46	\$4.94	\$4.19	\$4.44	\$4.78	\$5.58	\$6.99

Table 4 — Performance Measure Benchmarking—United States

Performance Measure	Combination of 3 Libraries	Charlotte & Mecklenburg Co., NC	Multnomah County (Portland), OR	Seattle, WA
Population	467,799	640,000	641,000	539,700
# Permanent Locations	1 Central 25 branches	1 Central 22 branches	1 Central 14 branches	1 Central 22 branches
INPUT				
Annual Budget (actual operating costs)	\$20,405,202 Cdn	\$24,562,000 U.S.	\$32,417,307 U.S.	\$27,149,448 U.S.
Total Staff (F.T.E.)	305.7	402	455	443
Total # Items in Collection	1,559,895	1,621,426	1,093,172	1,179,262
Total Square Footage	320,892	378,997	250,317	336,334
# Public Access Workstations	495	500+ (currently adding 100)	268	459
OUTPUT				
Annual Total Materials Circulation	4,829,527	6,263,604	9,635,471	5,216,024
Annual Number of Reference Requests	778,116	1,338,608	786,381	1,491,862
Annual In-Library Materials Use	1,823,146	3,131,802	2,564,000	1,817,529
Annual Number of In- Person Visits	3,413,124	3,433,234	2,955,158	1,274,667
Percentage of Collection Replaced Annually	7.9%	7.5%	13.8%	N/A
EFFICIENCY				
Annual Number of Service Transactions per Capita	23.17	22.14	24.87	18.16
Annual Operating Costs of Library Services per Capita	\$43.62 Cdn	\$38.38 U.S.	\$50.57 U.S.	\$50.30 U.S.
Annual Number of Service Transactions per F.T.E.	35,459	35,242	35,042	22,122
EFFECTIVENESS				
Percentage of Population who Hold Active Cards	57%	67%	63%	85%
Annual Turnover Rate of Library Materials	3.1	3.86	4.99	2.59
Weekly Service Hours per 10,000 Population	22.57	23.22	13.35	23.64
Annual Library Materials Expenditure per Capita	\$4.94 Cdn	\$5.11 U.S.	\$7.92 U.S.	\$6.01 U.S.

Performance Targets

The first years of transition will be challenging and busy for library managers and library staff generally. Nevertheless, the Task Force has established performance targets for most measures for the New Hamilton Public Library. Budget projections are too uncertain yet to set financial measure targets but that should be possible early in 2001. The targets below are reasonable based on the experience of the current three systems and careful monitoring of performance will allow more ambitious targets to be set for the years beyond 2002.

Table 5 — Performance Targets

Type	Performance Measures	Targets for 2001 / 2002
Efficiency	• Service transactions per capita	• 24.5
	• Service transactions per F.T.E.	• 39,000
Effectiveness (Customer Satisfaction)	• Proportion of active cardholders in the population	• 60%
	• Turnover rate (average annual circulation per collection item held)	• 3.2
	• Total weekly service hours at all locations (per 10,000 population)	• 22.0
	• Collection expenditure per capita	• \$5.10
	• Exit survey of customers—satisfaction rate	• 90%
	• Survey of city residents—satisfaction rate	• 80%

Best Practices

The material provided to guide the work of all Task Forces included a section on Best Practices that contained the following advice:

"... learning is best if it occurs within internal project teams for a number of reasons:

- The most desirable outcome of a Best Practice process is when staff emerge better skilled, more competent and able to cope with further change initiatives. People learn best from hands on experience, and*
- Internal barriers to change are usually overcome more readily if the recommendations for change come from within."*

The shared belief in exactly this principle was behind the planning for the Transition Process put in place by the three Boards and CEOs of the current library systems. The process for library Transition Team assignments includes the requirement to make contact with external organizations for insights and suggestions and the requirement to determine if any potential alternative service delivery mechanisms might be used. The Library Transition Teams will be working at a level of detail appropriate for seeking out and evaluating best practices at the functional level, particularly in support services. Their work will continue over coming months and will be integrated into the operations of the new public library system.

An investigation of best practices applicable to public library service is both a daunting and a very simple task. Daunting because there is so much information and simple because so much of that information is regularly published and widely known. Librarians are experts at sharing service management information and new tricks are never secrets for long. Regular, process level improvements are constant in most public libraries as they have been at the Dundas, Hamilton and Wentworth systems. That continuous learning and testing against the experience of other library service managers is a value that we will build into the *New Hamilton Public Library*.

The Task Force has chosen the Ironwood Branch of the Richmond (BC) Public Library as a best practice worthy of a spotlight. There are several aspects to the innovations at the Ironwood Branch described here, all of which were planned as appropriate to the community that the branch serves. As part of a management series, the Chief Librarian of the Richmond Public Library was invited to speak to librarians in Hamilton in the fall of 1999 about the approach at the Ironwood Branch.

Other Best Practice findings are noted as relevant throughout the Report.

Best Practice Spotlight: Ironwood Branch—A Leading-Edge Library

The Ironwood Library in Richmond BC, which opened in 1999, is recognized for its innovation, reengineering of existing systems, and incorporation of retail and business trends into a library environment. It is a welcoming and entertaining, community space, with an excellent balance between “books and bytes”. It has received several awards, including the Canadian Association of Municipal Administrators (CAMA) Award and the Royal Bank of Canada Award, and the Canadian Library Association's Faxon Marketing Award.

A new attitude but still about books.

Richmond News, December 13, 1999

In order to achieve this leading edge status, many library functions were re-engineered to reduce the staff time spent on repetitive tasks. Customers help themselves both at the express checkout kiosks which are faster and more private and by picking up their own holds from shelves located in a public area. Self-sorting book returns where customers return books into categorized “slots” into the workroom wall, has enabled the work area for this repetitive task to be ergonomically designed to reduce repetitive strain injuries.

The library developed software that allows customers to pay fines by credit card, register for courses and book computer time directly without staff assistance. This has enabled staff to spend more time helping customers understand the new technologies, recommending books and answering information questions. In order to do this, they have received extensive and ongoing training in a wide variety of software products.

Ironwood feels more like a contemporary bookstore than a traditional library since an architect with retail experience designed it. All collections are shelved on bookstore-style shelving, face-out and many, many copies of best sellers are purchased and then sold when the demand for them declines. The Library Living room with its river rock fireplace, vending machines, and lounge furnishings provide a relaxing place to spend some time. Up to 41 people can use the Internet Café computers with recessed screens to access the Internet, e-mail or electronic resources at a time. Six computers are designated for access to Reference materials only. The silent study room has space to hook up 28 laptops. Daily storytimes for children are held in the Story Barn. Children can play with educational software and games at any of the five computers with large screens and mouse balls in the children's area.

Alternative Service Delivery

Alternative Service Delivery Options

The delivery of both public and support services has undergone a regular and continuous review within all three library systems. Extensive use is made of partnerships with municipal governments, school boards, and other library systems. The amalgamation of the three systems into the New Hamilton Public Library provides further opportunities to explore new methods. The focus of the Task Force has been to create a new Library based on best practices and one which continues the established trend to pursue alternative options whenever and wherever possible.

Overall Library Management

Unlike many other services, the core services of a public library cannot be subdivided easily. The only way to consider a substantial alternative would be the complete divestiture of the management of the library system.

There are few practical examples and little literature on this subject. Some attempts have been initiated in the United States. Riverside California has had a firm managing its Library for three years. The first contract term is now complete and the costs to manage the Library have increased dramatically from the first tender. Two of the municipalities in the county are now opting out of this service.

Another example is Jersey City, New Jersey. This instance is recent and it is not fair to judge its success. It is, however, very controversial within the community. Broward County, Florida called for proposals from private sector firms to manage their libraries but the initiative did not proceed past the Request for Proposal stage.

In the above-noted examples, the major reasons for moving to an outsourced system of management were poor management (real or perceived) and budget cuts. This in turn led to enormous customer dissatisfaction and the belief that outsourcing would remedy the problems.

There are few reports and no positive information on divestiture of the management of a library. The Task Force does not recommend any further consideration of this option for alternative service delivery.

Self-Checkout

A very desirable alternative to standard service delivery is self-checkout. Specially designed checkout stations are provided so that library users can easily check their own material out without staff assistance. The initial, up-front costs of implementing self-checkout are

substantial (\$30,000 per station plus \$1.00 per book to change the bar code information). Security system costs also increase. A full cost-benefit analysis for specific locations is a prerequisite to implementation.

The Task Force concludes that installation of this technology should be considered for the new South Mountain Branch of the Hamilton Public Library, which may result in fewer new staff being hired when it opens. Implementation of the new automated library system is necessary, however, before self-checkout is an available option. The Task Force suggests that investigation of this alternative be deferred until next year.

Smart Cards

A smart card is a credit card with an embedded chip that can carry enormous amounts of information. For example, a smart card could identify the card holder as a Hamilton resident, a senior citizen with certain rights, and a person registered for specific programs. The holder could also add money to the card and use it for bus fare, entering swimming pools, museums, and accessing other services. The Library Task Force contacted other Task Forces to ask if they foresaw any uses for such technology. A number did suggest possible applications including, perhaps surprisingly, Roads and Sidewalks and Public Health.

Smart cards with embedded chips are the most powerful form of this technology but they are expensive. A less expensive alternative is the credit card type with a magnetic stripe. Magnetic stripe cards carry less information, wear more quickly, and must be swiped each time they are used. Nevertheless, more applications are currently available for magnetic stripe cards.

Most successful attempts to use magnetic smart cards have used the cards only for departmental purposes (printing in libraries or riding buses) with little attempt to integrate the cards. More than half the residents of the new City of Hamilton will have active library cards. The unification of the three automated library systems means that the new library will re-issue more than 260,000 library cards. This is an opportunity to use the new library card as a city services card, unifying all potential smart card uses on a single card. If this proposal is to work most cost effectively, it must be acted upon immediately and more investigation is necessary.

Recommendation # 2

That the City Manager establish a working group, based on the existing Library Transition Coordinating Committee and expanded to include, the City/Region Director of Corporate Communications, a representative from the Hamilton Street Railway, a representative of the Municipal Services Centre Task Force, and a representative from the Culture and Recreation Task Force, to prepare a project plan (including feasibility, timetable, and, if appropriate, an RFI) by July 14, 2000.

Electronic Notification System—TeleCirc

The Hamilton Public Library currently uses an automated voice notification system to let patrons know about overdue library material and about 'reserved' material on hold for them. The system replaces the need for staff to call customers about items on reserve and it

eliminates the need for almost 90% of all mailed overdue notices. Wentworth Libraries currently spends \$6,600 on postage for overdue notices while the Dundas Public Library spends \$600. There are also costs in purchase of printed mailers or time to address and stuff envelopes.

The TeleCirc system is an add-on module of the library automation system and an upgrade to Hamilton's current hardware and software is necessary to handle the volumes for the *New Hamilton Public Library*. Use of this Electronic Notification System will reduce postage and printing costs and will allow staff to apply themselves to more productive library work.

Recommendation # 3

That transition funds be approved to upgrade the TeleCirc module, allowing use of electronic notification in the *New Hamilton Public Library*.

Already Underway ...

- The Transition Board approved funds for the library automation system at its meeting of May 16, 2000 and TeleCirc was included in that upgrade cost.

Partnerships

Although partnerships between the public library and other community agencies or levels of government are extensive, savings may be realized by either developing or increasing partnership relationships. The Task Force feels there are significant opportunities in the service response areas of Basic Literacy, Business and Career Information, Community Referral, Formal Education Support, Government Information, and Local History.

Shared Licensing

The three current library systems are all partners in the Hamilton-Wentworth Information Network and share Internet connectivity. This also allows members to share license fees for some electronic products. The two school boards also purchase electronic products as part of our consortium. We are negotiating a financial arrangement with the school boards that will allow the new library system to purchase remote access rights to various electronic products (allowing school, home and business access to thousands of periodicals, encyclopedias, etc by use of a library card).

Federal Government Initiatives

CAP/Bill and Melinda Gates Foundation

The Hamilton Public Library recently received \$240,000 from the Bill and Melinda Gates Foundation in order to add 43 public access Internet work stations in current City of Hamilton library branches. The grant also includes network printing capabilities and local servers for all current Hamilton public library branches.

In addition, the Chief Librarians of the Hamilton Public Library and of Wentworth Libraries have been working with Industry Canada to create a change in their Community Access Program (CAP) regulations that would allow the three library systems to apply for a single CAP grant, treating us as if we are already a single, urban library system. While there is still some paperwork to be completed, we have received word that this request has been approved and that the new City of Hamilton Public Library system will receive a CAP grant of \$442,000. The grant will be spent on adding computers to all library branches, improving the speed of network connections and providing public Internet training.

In total, then, the new public library system will soon receive \$682,000 to improve public Internet and electronic resource access. The same technological base can be used to assist

people to access local government resources. The staff at the new City of Hamilton Public Library system will be well trained in assisting people to use web resources.

Both the Gates and the CAP grants come with some conditions. The primary condition, common to all Gates and CAP grants, is that the programs they have funded must be operational by March 31, 2001.

Ancaster Library

The Ancaster branch of Wentworth Libraries is located in the Ancaster Municipal Offices. We recommend that space allocated for public library service be increased as soon as possible. As you will note in the section on the Community Access Program (CAP), the new Hamilton Public Library is being given \$442,000 to extend public Internet access and to provide public Internet training. We plan to establish several public training centres at libraries across the new city (such centres already exist in both the Saltfleet Branch of Wentworth Libraries and Hamilton's Central Library). The increased use of public access computers in Ancaster will allow the Ancaster Branch to act as a partner for the Municipal Services Centre planned for the same building. In conjunction with the Municipal Services Centre Task Force we have already held a preliminary discussion with the provincial government about providing access to their services in the Ancaster Library.

Increasing the size of the Ancaster branch will also help to take pressure off other mountain library locations. The west mountain and Ancaster areas are growing rapidly and existing library locations are too busy.

Recommendation # 4

That the size of the Ancaster branch of the new library system be increased immediately in order to accommodate a public and staff computer training facility to be funded through a Community Access Program grant.

Best Practice Findings ...

Central Library, Saltfleet, Ironwood, BC

Municipal Services Centres

As part of the Community Access Program (CAP), the new public library system will gain improved Internet access at all locations and will have the capabilities of training citizens to use web and Internet resources. This increased capability positions the new City of Hamilton to move, aggressively, toward the provision of web/e-business solutions. As a partner to the City, we will work to make all library locations access points for local government services and places where citizens can receive both training and assistance.

Co-Location

The Library Task Force recognizes that partnerships with other organizations, most notably the City Culture and Recreation Department, can allow the public library to help in the creation of community destination points. Partnerships with other organizations can also help to save operating costs. An initial investigation of the south mountain Turner Park facility showed savings of \$5,000,000 in construction costs and hundreds of thousands of dollars in operating costs if the Hamilton Public Library, Culture and Recreation, and Police Services Board work together.

Recommendation # 5

That the construction of any new library facility take advantage of partnerships with other municipal departments and, where appropriate, with private sector partners in order to create a busier destination, save Capital costs, and reduce operating costs.

Best Practice findings . . .

- Tansley Woods (Burlington), Humberwood and Malvern (Toronto), Ironwood (Richmond, BC) and Saltfleet (Wentworth).

Collection Management

Collection Leasing

Both the Hamilton Public Library and Wentworth Libraries currently lease some popular material. The Hamilton Public Library is the only urban library system in Canada to lease portions of its collections, and it has done so for over three years. Instead of purchasing bestsellers, which have a high level of temporary demand, the two library systems lease most of their bestsellers and return them when demand recedes. This service has allowed the two libraries to provide a much higher level of service for approximately one-third of the cost of purchasing and cataloguing bestseller material. The lease arrangement is being expanded to include other types of material that may be popular for only a limited time. For example, the Hamilton Public Library is starting to lease travel guides that are updated on an annual basis.

Materials Selection Outsourcing

Materials selection outsourcing involves a library contracting with a private supplier to take over the selection, cataloguing, and processing of library materials. The only example of complete outsourcing was the state of Hawaii. A five-year contract was signed in 1996 but there were so many problems that the arrangement was terminated in 1999. There are multiple lawsuits.

Both the Brampton and Mississauga library systems do selective or partial outsourcing of material selection. A library Transition Team is investigating options for possible implementation in 2001. It may be possible to contain costs and allow staff to focus more time on other library matters.

Other Administrative and Support Functions

The library Transition Teams are conducting investigations and preparing to make recommendations on how the new library should function. The Teams were directed to look not only at the existing practices but practices in other libraries so that the very best method would be employed, not the best of the existing three. While their work is centered on amalgamating three distinct systems, they are ensuring that best practices that will generate the greatest efficiencies are incorporated in all of the recommendations they make.

Administration

The municipal partner of each library already does much of the administrative work at the three current library systems. The Task Force expects that this arrangement will continue in the new municipality. Any alternatives in these areas would see savings for the municipal side of the partnership.

Limited staffing for administrative and human resource functions remains with the new library and the Task Force believes this is the most practical and efficient arrangement. It assumes multi-tasking but results in effective consolidation of information and communication with finance or payroll from an organization with a sizable staff complement, specialized purchase processes, a dispersed work environment and extended service delivery hours.

Maintenance

Similarly, the Task Force foresees overall facility management being done at the municipality-wide level, as is already the case for the Hamilton and Wentworth systems. A corporate Facilities Management unit could also coordinate major cleaning and janitorial work since there may be savings of scale in an overall contract. Minor maintenance should continue to be done by a small library maintenance janitorial staff who can deal quickly with room-setup or minor repairs in heavily-used, public locations with extended service hours.

The security staff necessary for the Central Library facility (and on-call to other branches) should continue under a contract administered by the library in partnership with the Farmers' Market.

Courier

The new Library will require a specialized courier service to meet its service expectations. It is anticipated that the volumes handled by the library courier will increase dramatically in the initial stages of amalgamation. Experience in other library systems shows that courier usage increases for the first year or so, as patrons borrow a book from one former library system and return it to another.

While courier functions are handled differently in the three current systems, the Task Force expects that the new Library will outsource courier delivery service. The Library would be more than willing to investigate the inclusion of other departments in its courier contract planning to ensure that all cost savings are pursued.

Volunteers

A telephone survey⁴ of seven public libraries, ranging from medium-sized to large and with both unionized and non-unionized staff, was conducted. All libraries reported that volunteer tasks must be interesting and worthwhile in order to recruit and retain volunteers. They also indicated that an acceptance rate of 50-75% of the volunteer applicants is considered good. Volunteers were used more often and in more ways in the smaller, non-unionized libraries. However, when large unionized libraries tried to adopt these same practices they found that they could not retain volunteers.

Best Practices

Volunteer Coordinator

Where there is extensive use of volunteers the literature is filled with recommendations that a paid staff position be created with the authority to recruit, screen, train, and supervise volunteers. Volunteers who have written job descriptions are seen as the most effective. Some libraries noted that some volunteer positions required additional screening by the Police Department and/or bonding. The Volunteer Coordinator usually arranges this.

⁴ Survey conducted by S. Boughton, HPL staff member, on behalf of the Library Transition Team, April, 2000.

Visiting Library Services

VLS is often organized so that volunteers deliver material to homes as well as retirement and nursing facilities while the staff continue to select material. Staff from other library systems were unanimous in agreeing that this particular use of volunteers allows staff time to be used more efficiently. They believe that they can reach a greater percentage of this population, serving more people with the same resources.

Friends of the Library

Friends groups are independent organizations established to advocate, fundraise and support the public library. A Friend's group has its own constitution and by-laws, but works closely with the Library Board and staff to meet library objectives. Typically Friends run book sales, sell merchandise and organize special events. The surveyed libraries report that significant staff support is required to assist with Friends activities.

Children's Reading Programs

Some libraries use volunteers during the summer to work 1:1 with children who have reading difficulties. This is a good fit with the 40 hours of volunteer time that all high school students must complete before graduation. Again, a volunteer coordinator is required for recruitment and supervision. Such a coordinator could be a summer student hired for this purpose.

Adult Literacy Programs

Libraries offering adult literacy programs use volunteers to tutor adults to learn to read or to learn English as a second language.

Routine Tasks

Routine library tasks include shelf reading, shelving, filing, etc. Our telephone survey and literature search indicates that the use of volunteers for this type of task does not work well in large libraries. Staff report high turnover rates for volunteers, resulting in uncompleted work as well as expensive training, scheduling and supervision issues. In small libraries, where the volunteer is a recognized community member, this seems to be a more successful use for volunteers.

Non-Tax Revenue Sources

Charitable Status

Public libraries are successful at raising funds both because of the feeling, from many residents, that they want to give something back to a service they have enjoyed and because of the belief that dollars given to libraries do make a difference. Each of the three current library systems has funds donated in trust to improve specific services.

Community Access Program

Industry Canada recently announced the urban version of its CAP program, helping to create centres where the public can use the Internet without charge. The new Hamilton Public Library has received informal approval of its grant request of \$442,000. The federal government is starting to provide rural CAP sites with annual operating funds. If this same program is extended to urban sites, the new City of Hamilton Public Library would be eligible for up to \$150,000 a year.

Friends of the Library

Friends of the Library commonly engage in fundraising activities. They sell lottery tickets, operate the annual book sale of discarded library material, seek donations, and help in local fundraising activities when library branches are being built or renovated.

Partnerships with Senior Levels of Government

Canadian public libraries are working as a group in order to negotiate payments to public libraries in return for provincial and federal governments gaining the right to 'advertise' that certain services are available at local libraries. Unified negotiations on behalf of all public libraries have proven successful when dealing with government.

Delivering Library Services in the *New City*

Role Definitions for Branch Libraries

Large multi-location public library systems must have a method of organizing service delivery and allocating resources across the system. Such a system-wide outlook will be essential in the first years of the *New Hamilton Public Library*. Library managers and library staff must be able to explain to the public how the new public library system works. The branch role framework outlined here builds on the history of library service planning in the two existing multi-location library systems and it provides an integrated approach to the delivery of services.

This section outlines an organization based on tiered branch services. The approach is a "big picture" overview of how the amalgamated library system will look. It provides a framework within which resources can be allocated as we work towards a single library system and it provides a structure for determining equitable access to library services across the new system. Role definitions for branches are *descriptive*, not *prescriptive*.

The Task Force recognizes that the branch roles and system structure outlined here is a starting point. It will be used by the Library Transition Teams as they continue their work in the coming months and work by those Teams will further refine the model and expand the descriptive definitions. Once the new library system is operational and can turn to systematic planning and long-term goal setting, the Task Force expects a review of branch role definitions to be part of that work.

Tiered Service Delivery

The proposed model provides for a range of services based upon size of library and community need. The *New Hamilton Public Library* will have four tiers of library service, forming a continuum of service. The model begins with Tier 1 describing the smallest unit of service and builds to Tier 4 describing city-wide services. Throughout all tiers, customer service, collections, staff expertise, technology and administrative support are constant.

Assumptions in the Development of Branch Roles

- There will be common service elements within each tier. (For example, staffing could be the same for all libraries within a tier.)
- Each library will be responsive to its community's needs by designating its resource inputs to appropriate pre-selected roles.
- The district libraries (tier 3) are determined by a combination of factors such as distance from other libraries, service requirements, and resources available and size (or use) alone does not make a branch a district library.

- The service role of the Central Library will not significantly change.
- An increase in circulation will not automatically move a branch to a new tier. It is possible that a lower tier branch could have a higher circulation than a higher tier branch.
- The descriptors of service hours, staffing, etc. are "big picture" concepts demonstrating relativity. Actual changes to service hours and staffing levels will be determined later by a more rigorous analysis based on resources available, community needs, etc.

The Service Tiers

Tier 1—Neighbourhood Libraries

Tier 1 describes the smallest branch service unit, serving a population of less than 20,000 residents. These libraries are valued as a focal point for community. They provide a convenient access to the resources of the entire library system. Core children's services (including programs), and services to targeted groups such as seniors or immigrants may be stressed. Collections are relatively small and change frequently reflecting community demand. Electronic information resources provide access to a broad range of reference materials. Within Tier 1 the rural libraries and the urban libraries are differently described with respect to such factors as distance from another library and population size. Tier 1 will also include library services delivered through community partnerships so that the residents of small communities can conveniently access the resources of the library.

Tier 2—Community Libraries

Tier 2 describes branches that are mid-sized and conveniently located, community-based libraries. These libraries serve communities between 20,000—40,000 population and focus their services on recreational and informational needs, providing access to materials and children's services. Their collections, based upon demand, support browsing and general information. They build upon the Tier 1 collections to provide a broader range of materials. Convenient access, the provision of electronic information, children's programming, and community meeting facilities are all part of their mandate.

Tier 3—District Libraries

These large libraries serving populations over 40,000 people are strategically located to provide extensive collections, services and facilities to parts of the city distant from the Central Library. Their extensive collections serve recreational and informational needs, through a mix of circulating and frequently used reference materials. District libraries have an important role in supporting the "information infrastructure" of the library system with the provision of in-depth collections and staff expertise. They complement, but do not duplicate, the Central Library. While they may have a neighbourhood or community library located within their defined geographic area, they do not provide supervisory functions for such libraries. They provide a full-range of programs and services suitable for, and supported by, a large population base.

Tier 4—Central Library

Tier 4 Services⁵ are those designed to meet needs across the entire city. The Central Library will be the reference/resource library for the entire new city. The Central Library's collection will

⁵ Other Tier 4 services are the **Visiting Library Services**, **DISH**, the **on-line catalogue**, the **web site**, off-site access to **electronic information resources**, and **Bookmobile** service.

include extensive reference materials in addition to a circulating collection designed to meet present and future needs. Specialized information services such as Special Collections, Disability Information Services, and the QUIC information service are provided. The Central Library also purchases and rotates special format collections including large print, talking books, and multilingual items to the branches. Within the Central Library the "Branch on 4" provides neighbourhood library services (*Tier 1*) to the immediate community living or working around the Central Library.

Tier Profiles for Branches

The profiles are mutually exclusive for descriptive purposes. In practice, few branches fit into the tiers exactly as described. For example, some branches have larger facilities than their population base or circulation would indicate.

Table 6 — Branch Tiers

Factor	Tier 1- Neighbourhood 1A 1B		Tier 2 Community Libraries	Tier 3 District Libraries	Tier 4 Central Library
Population	<10,000 Serves one village and surrounding rural area	10,000 - 20,000 urban population	20,000 - 40,000	40,000+	Entire city
Distance from other library/ area served	Several km.	>1.6 km.	> 2.5 km.	6 - 10 km. to a district/ Central Library	Serves entire city.
Facilities (sq. ft.)	<3000 No meeting facilities		5,000+ One meeting room	15,000+ Variety of meeting rooms	162,000 sq. ft. Variety of meeting rooms
Collection Size	Up to 20,000 - 30,000 items Collections rotate according to community needs and space		35,000 - 60,000	75,000+	500,000+
Collection Scope	Popular and current materials in variety of formats Core reference collection (print and electronic)		More variety to satisfy browsers and info searchers Basic print reference collection	In-depth, long-term collections Good reference collection	Comprehensive collection of circulating/ reference materials
Annual Circulation	<75,000	75,000+	200,000+	400,000+	1,000,000+

Service Hours/ week	18 - 24 hrs.	<35	40 - 50 hours per week	Generally 50+ hours Sunday service	70 hours Sunday service
Staff complement (in FTE's)	1.5 - 3.5 No librarian	2.5 - 3.5 No librarian	4 - 8 ⁶ Librarian/ manager	10+ 2+ librarians/ one of which is also the manager	Includes those providing city wide services such as VLS.

Future Directions for Branch Services 2001—2004

Although few branches fit perfectly within a tier, each has been placed according to “best fit”. There will be significant changes to these placements over time as population grows in some areas of the new city and library services adjust in response.

Table 7 — Branch Tier Groups

Tier 1A	Tier 1B	Tier 2	Tier 3	Tier 4
10 libraries	5 libraries	7 libraries	3 libraries	1 library
Binbrook Carlisle Freelton Greensville Lynden Millgrove Mount Hope Rockton Sheffield Winona	Barton Locke Picton Stoney Creek Valley Park	Ancaster Concession Kenilworth Red Hill Sherwood Westdale Waterdown	Dundas Saltfleet Terryberry	Central

This Branch Role definition is the first step in describing the services to be offered by the *New Hamilton Public Library*. It groups “like with like” for planning purposes. Its primary purpose is a practical one — to get the new system up and running. A detailed branch facilities study will follow when further information, such as the impact of the removal of political borders upon library use, common statistical information, and community input is available.

In previous planning decisions, both the Hamilton Public Library and Wentworth Libraries had determined that additional neighbourhood libraries not be built. Both systems were concentrating on adding facilities for large populations and with refurbishing and relocation of existing facilities. Given this, these broad directions for service planning have been identified for the period of 2001 - 2004. The new library system will:

⁶ Two-storey buildings (e.g. Kenilworth, Sherwood, Dundas, Waterdown) have additional staffing components and hence additional operating costs.

- Shift resources and harmonize services according to this model. All present resources will be required to provide the flexibility necessary to implement this.
- Focus on the development of district libraries in partnership with other community agencies (e.g. Turner Park, 2003).
- Assume that there will be no new Tier 1 branch locations and that current Tier 1 branches will be renovated, or relocated, in stand-alone facilities only where there is no community partner for service delivery.
- Continue with the relocation and refurbishing of existing libraries as required.

Outreach Service to Elderly, Disabled & Low Income Groups

The existing Hamilton Public Library Bookmobile and Visiting Library Services⁷ will be reorganized in order to meet the demand for service from specific populations throughout the new City of Hamilton.

The targeted population groups are:

- Elderly seniors who are able to maintain some independence
- Seniors who have disabilities and/or receive long-term care
- Adults with disabilities such as blindness or limited mobility
- People who have extended illness which confines them to home or hospital
- People who do not have access to vehicles or bus service to reach a branch, which is distant from their homes.

Visiting Library Service

The Visiting Library Service, which selects and delivers materials to individuals in their homes, will expand their service. Currently they serve almost 500 homebound individuals, and this number is expected to increase with the expansion of the city. To manage the increased workload:

- Library staff will focus on selection of materials for clients and client relationships.
- A volunteer coordinator position (paid) will recruit, train and supervise the volunteers who deliver materials.
- Delivery will be done by volunteers with some assistance from a courier service, if required.
- The service criteria will be reviewed.
- Service will remain centralized.

Bookmobile Service

The focus of the Bookmobiles will change. Bookmobiles will serve only seniors buildings and low-income neighbourhoods distant from a branch library.

⁷ For a description of the current Hamilton Public Library Bookmobile and Visiting Library Services see Appendix 2.

Seniors Service

- Bookmobiles' biweekly seniors' service will be extended to include all of the larger residences in the new City of Hamilton where frail, elderly seniors live. The number of such residences is expected to double from the current twelve. Seniors would select materials on the van.
- Bookmobiles will deliver materials pre-selected by Visiting Library staff to patrons in those same institutions, who could not physically access the van. Service would be monthly.
- Buildings such as retirement homes and lodges will be surveyed to determine size of population, number of potential users, current library service (if any), parking.

Low Income Neighbourhoods

- Service would be mainly in the former city of Hamilton where 86.5% of poorer population of the region resides. One area of Stoney Creek could fit the criteria if population density warrants service.
- Bookmobile Service will only be provided in low-income neighbourhoods distant from a library. To assure efficiency, potential for high rate of circulation would remain as a criterion. Approximately seven neighbourhood stops will be served; four current stops will be discontinued.

Cost Containment

The bookmobiles will no longer visit any day-care centres. The Library will support day care centres through other initiatives such as Sharing Literature with Children and the Family Literacy Network. Day-care service providers will be able to borrow from branch libraries but will be expected to select materials themselves.

This discontinuation of day care visits combined with increased use of volunteers in the Visiting Library Service will allow services to be delivered under equitable policies across the whole of the new City without significant budget increments.

Recommendation # 6

That the Bookmobile and Visiting Library service criteria be changed to provide equitable access across the city for the elderly, disabled and low-income groups. Service will be provided within the current operating cost envelope.

Resources and Policies Necessary for the Transition

Policies

Service Equalization

The Library Task Force concluded that there will be no significant urban/rural library service differentials once the New Hamilton Public Library is operating.

Service differentials do exist among the three current library systems but they are not reflective of an urban/rural split that can or should be preserved. The following points were considered in reaching this conclusion:

- Access to the collections of the three current library systems will be open to all residents, without boundary restrictions. All residents can request that any item from the collection be delivered to a library location convenient to them for pick up.
- Residents will choose, individually, which library branch they wish to use and many will regularly choose more than one branch (e.g. close to home, close to work, larger collection).
- Many current rural areas served by Wentworth Libraries are becoming suburban, even urban.
- The Central Library will be accessible to all residents of the new city.
- Increased use of licenses for electronic resources that allow remote access is diminishing the importance of where a person might reside.

Recommendation # 7

That there be no urban/rural differentials in the New Hamilton Public Library and no area rating of taxes levied for public library service.

There are no Best Practice Findings that illustrate an urban-rural differential.

Financial Policies

An overall transition to a single accounting structure will take place later in the process. The detailed budget for 2001 will be developed under the overall coordination of the finance team for the new city. There is also a library Budget Transition Team that is examining how to track costs efficiently while providing library managers with the most useful information. However, some specific financial policy matters require attention early in the planning.

Reserve Funds

All three libraries currently hold monies in reserve funds as listed below.

Dundas	Hamilton	Wentworth
<ul style="list-style-type: none">• Computer• Major Capital Expenditures• Fundraising	<ul style="list-style-type: none">• Mobile Equipment (Bookmobiles, etc.)• Repairs to Grounds• Repairs to Buildings• Replacement of Photocopiers• Purchase of Books• Miscellaneous Collections• Automated acquisition systems• Non-book Library Materials	<ul style="list-style-type: none">• General Development• Equipment Repair & Replacement• Sick Leave - Library• Library Working Fund• Collections Development• Waterdown Library

The New Hamilton Public Library should have four new Reserve Funds and the existing funds should be incorporated into the newly established ones wherever possible.

Recommendation # 8

That four new Reserve Funds be established for the New Hamilton Public Library: Mobile Equipment, Collections, General Development, and Major Capital Projects, and

That the existing funds be incorporated into the new funds as appropriate, with the exception of the capital project reserve funds which should be retained for expenditure on either branch services in the area for which they were collected or on city-wide service development.

Collection development involves thousands of individual purchase decisions for items often months in advance of the publication date. There is no control over whether a publisher will advance or delay delivery. There are also significant fluctuations in costs due to changes in the Canadian dollar exchange rate.

Controlling all of these factors to make the collection expenditures fit a year-end budget deadline is impossible. While some libraries compensate by doing binge buying late in the year to "spend the budget", such activity is not an effective collection development activity. The Task Force suggests that surpluses (or deficits) in the collection accounts be transferred to a Collection Reserve Fund to meet accounting requirements, track expenditures accurately, and avoid counter-productive year-end activities.

Recommendation # 9

That the New Hamilton Public Library establish a Collections Reserve Fund and that any surpluses or deficits in collection expenditure accounts in the Library's budget be added to or deducted from this Reserve Fund at year end.

Best Practice Findings...

Kitchener Public Library

Wentworth Libraries

Trust Funds

The Hamilton Public Library also holds special funds in trust accounts for donations which have been received. These funds include: the F. Walden Bequest, the M. Walden Thompson Bequest, the Ketha McLaren Memorial Fund, the Special Gifts Fund and the Capital Endowment Fund. Wentworth Libraries has donated funds in a reserve account for use in a project for a new Waterdown branch and Dundas Library has a similar reserve for fundraised funds.

Recommendation # 10

That the status of the Fundraising Fund (Dundas) and the Waterdown Library Fund (Wentworth) be changed from Reserve Funds to Trust Funds under the New City of Hamilton Public Library Board, and

That the monies in these funds be held for the purpose for which they were received as donations.

Governance

The Task Force considered options available for governance of the new Hamilton Public Library. There are two major possibilities: a department of the new city incorporated into the corporate structure, or governance by a Library Board appointed by City Council as is the case now for all three current library systems.

The major advantage of status as a City Department is the ability of the library to link with corporation-wide initiatives, to secure savings of scale, and to participate as any other City Department within the management structure of the City. The current relationship of the Hamilton and Dundas Public Libraries to their respective municipalities demonstrates that departmental status is not a necessary prerequisite to make those advantages work. All three current library systems use administrative services such as payroll and facility maintenance

from their partner municipalities to maximize efficiencies and this will continue to be an essential feature of the new library.

We believe that library-city linkages should be a strong and visible principle of operation between the new city and the new library. We believe that the Library should be closely aligned with the City and work to achieve municipal objectives.

However, governance by a Library Board appointed by City Council under the *Public Libraries Act, R.S.O. 1990* confers some advantages that strengthen the Public Library and ultimately the City. This model has no disadvantages in lack of accountability because City Council appoints members of the Board and has control over the Library budget.

The public library is strengthened because issues of intellectual freedom are considered outside the political sphere. and the management team's knowledge of the community is enriched with Board member's input. Library Boards also ensure citizen participation in their local government

As an independent organization, the Library can have status as a registered charitable organization. This enables the public library to develop alternative revenue sources based on fundraising and grantsmanship. Independent charitable tax status enables the Public Library to act as a strong community partner and lead agency with other City Departments and community groups to manage joint projects supported by grant and donation funding. The volunteer time, expertise and community connections of board members also enhance the ability of the library to participate frequently and appropriately in community fund-raising events.

At the same time, a Library Board that is not aligned with Council and senior management can create a poor governance environment. Library Boards, because of their informal, volunteer nature, often have difficulty identifying the line between policy decisions and management responsibilities before that line is crossed

After a careful weighing of both alternatives, the Task Force concludes that at the current time the advantages of a Library Board outweigh the disadvantages.

Recommendation # 11

That the new City of Hamilton Council pass a By-Law, under the *Public Libraries Act, R.S.O. 1990*, establishing a Hamilton Public Library Board no later than the third meeting of the new Council.

Best Practice Findings...

- Library boards are the standard governance model across North America
- All of our Canadian and American benchmark partner libraries operate under the governance of a library board.

The Task Force suggests that the potential disadvantages of a Library Board can be minimized if the Board is as small as possible in size, includes a limited number of Councillors and is recruited to reflect the cultural, educational and social diversity of the City. Board members should not be appointed on the basis of geography, former municipal boundaries or new ward boundaries. Such selection encourages Board members to think of themselves as representatives of that part of the city rather than part of a Board of Directors for a library that serves the whole City.

The Library Board By-Law Transition Team will consider options before bringing forward its recommendations on Board governance arrangements.

Recommendation # 12

That the Transition Board receive from the Library Board By-Law Transition Team, no later than September 30th, a proposed By-Law for the creation of a single library board for the New City.

Barrier to Effective Board Governance

The Task Force does recognize a barrier to the effective and timely establishment of the new library board in the legislative requirement to seek recommendations for appointment from the school boards. That process frequently results in delay in library board appointments at the start of a new term or delay in filling vacancies in mid-term. School Boards provide none of the funding for public library service and their involvement in the Public Libraries Act is an anomaly left from a pre-1960 era when public libraries in Ontario were under the auspices of the Ministry of Education.

City Council should have authority to appoint all members of the library board without restriction both in order that they have full confidence in the Board and so that they can seek a balanced range of community experience among the appointees they select.

Recommendation # 13

That a legislative change to Section 9 (3) of the *Public Libraries Act, R.S.O. 1990* be sought from the Provincial government such that the City of Hamilton not be required to seek school board recommendations in appointing its public library board.

Best Practice Findings...

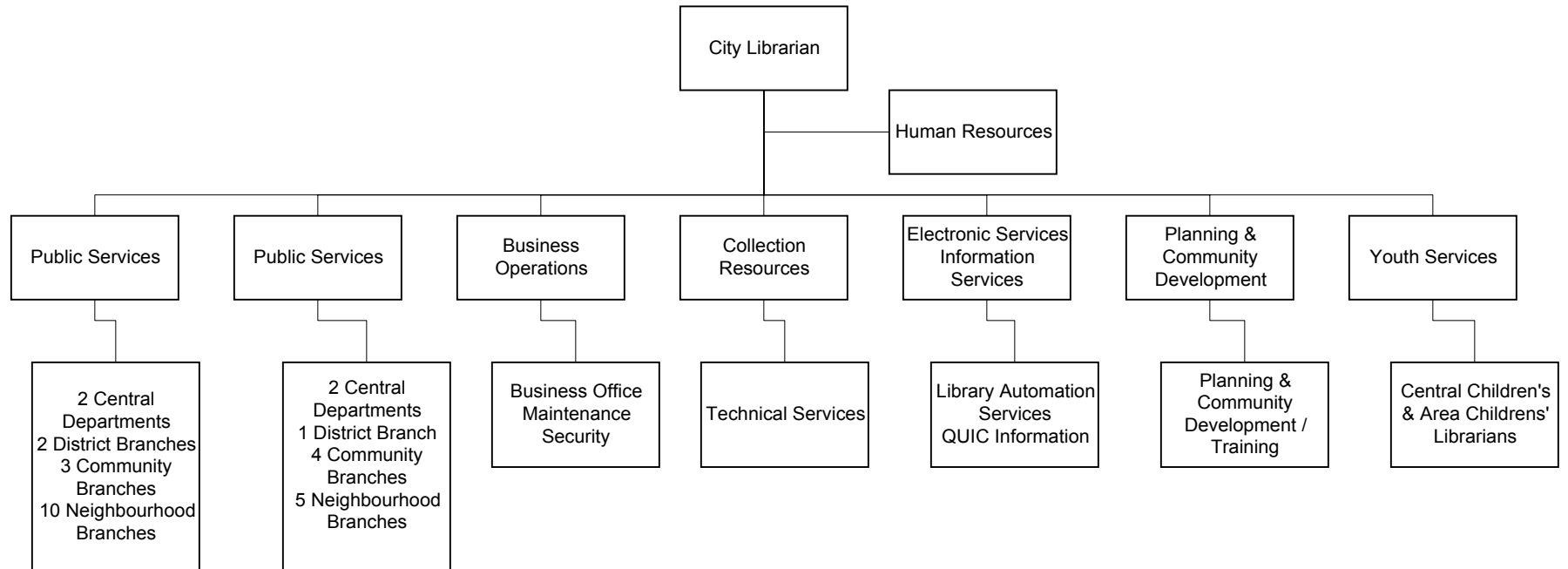
- County Library Boards in Ontario
- Wentworth Library Board

Organizational Structure

An Organization Structure was developed. The following questions were used as criteria for the suitability and probable success of the functional structure for the organization:

- Is it flat?
- Will it be flexible?
- Is it lean?
- Does it avoid geographical divisions?
- Does it meld the three library systems and create a new organization?
- Does it address issues raised by Labour Board decisions that have affected management structures in other library systems?

Functional Organization Chart



Implementation and Action Plan

Implementation

The three current library systems, working together, have created a number of library transition teams. Each team, composed of staff from each library system, has been given a clear mandate, from the unification of circulation policies to the methods for efficiently selecting material. Most of the teams established to deal with issues that must be settled by the end of the year are working and are on target. The process the three library boards approved last February is similar to that put in place for the Transition Board Task Forces. The library Transition Teams provide interim reports to the Coordinating Committee, which then takes identical recommendations to each of the current library boards. The assumption, based on our reading of the legislation, is that any policy approved by all three library boards becomes a policy of the new City of Hamilton Public Library Board and remains in place until the new Board revises or rescinds it. The more we are able to put in place this year, the less pressure there will be on the new Board to do "everything at once". First priority in the process goes to ensuring a smooth transition of public service delivery next year.

Recommendation # 14

That the Transition Board acknowledge the transition planning process already in place among the three public libraries and endorse the efforts of library boards, managers and staff generally to implement the service foundations outlined in the Library Task Force Report, and

That the process continue, and

That the Library Coordinating Committee provide a brief progress report through the City Manager in August , October and December of this year.

The new Library Board for the *New City of Hamilton Public Library* will not be in place by the creation of the new municipality. Other amalgamating municipalities have found it necessary to create an interim library board composed of representatives from each existing library board to function in the months before new Board appointments. The *City of Hamilton Act* does not call for such a bridge arrangement and provides for the current boards to deal with emergencies. It may or may not be necessary to establish interim Board authority depending on the success of the library transition process.

Recommendation # 15

That the three current library boards submit a proposal to the Transition Board by the end of November for the establishment of an Interim Library Board, if such an arrangement is deemed necessary.

One Time Costs and Savings of Amalgamation

Integrated Library Collection Management System

The New Hamilton Public Library requires an integrated library automation system capable of supporting its projected activity levels. An upgraded system is needed to allow library users to present a single library card at all locations, identify and access all the resources of the new system, place holds on specific items and return materials at any branch. An automated library system is the basis for catalogue access, inventory control and circulation management for library collections.

One of the Library Transition Teams has been investigating capabilities of our existing systems as well as requirements for the amalgamated system. They have recommended a proposal from Epixtech, the vendor used now by both the Hamilton and Wentworth Libraries.

The proposal from Epixtech is a very good one and the value of seeking an upgrade path with the automated system that both Hamilton and Wentworth already use is significant. Both the Library Task Force and the Information Technology Task Force have reviewed the Epixtech recommendation. Both Task Forces have endorsed it. The Library Coordinating Committee has also provided the report to each of the Dundas, Hamilton and Wentworth Library Boards and the proposal is supported.

Previous cooperative efforts among the three libraries mean that we are able to implement an integrated automation system effectively and at approximately one quarter the cost that Ottawa-Carleton expects to have to pay for a similar system. That same history of cooperation means that library users across the new city have extremely high expectations for the level of integrated operation of the new library system early in 2001. We are working now to meet the challenge of those expectations.

Recommendation # 16

That the proposal from Epixtech, dated April 24, 2000, for a database / system merge and technology upgrade be approved, and

That, where applicable, the hardware required for the upgrade be submitted to bid for competitive pricing and leasing, and

That the purchase process be led by the Business Administrator of the Hamilton Public Library and implementation of the new system be managed by the Library Coordinating Committee (Chief Executive Officers of the three library boards), and

That the capital cost in the total estimated amount of \$422,038 plus taxes be funded from transition funds.

Already Underway ...

The Transition Board approved funds for the library automation system at its meeting of May 16, 2000 and staff are working on the implementation.

Business Supplies

Library Cards

There will be an amalgamation cost in the purchase of sufficient library membership cards for the new library to issue to up to 300,000 people. If smart cards are pursued the cost will be approximately \$1.80 or \$540,000. The decision to use smart cards is obviously one that would require an overall City commitment. Regular library cards cost approximately \$0.20 each and the total would be \$60,000.

Stationery

Replacement of stationery and other minor office supplies is estimated at a cost of \$3000.

Publicity Materials for New Policies

The new library system will have to produce an unusually large volume of materials explaining changes in circulation policies. The cost is estimated at \$8000.

Facility Costs

Signage Replacement

New exterior signs at all service locations will cost approximately \$50,000. A replacement timetable will be determined to make the changes as cost effectively as possible. Signs do not all have to be replaced in the first few months.

Wentworth Administration Office

The Wentworth Libraries administrative office location will not be required in the new system. It is expected that there will be sufficient space to house all support functions at 55 York Boulevard. There will be a decrease to the annual operating budget of the lease cost of \$99,900.

Recommendation # 17

That the Wentworth Library Board exercise the early termination arrangement in the lease of its Administration Office at 70 Frid Street.

Human Resource Costs

Some costs cannot be quantified yet. There will be a one-time loss of revenue because of the termination of the special pay equity grant received by Wentworth Libraries from the Ontario government. This amounts to \$92,850.

Training and Team Building

An estimate of \$200 per employee is being used as a base figure for training by some Task Forces. Because the service tool most used by staff is the library automation system already in use by much of the staff, the Task Force has adjusted this estimate to \$150 per employee or \$48,000 for training and team building in the new library system.

Table 8 — Summary of Operating Dollar Impact

Expenditure Type	Combined Budgets for 2000	Anticipated Impact for 2001
Salaries and Benefits	\$13,815,930	Pay equity impact unknown ¹
Materials, including processing	2,497,240	No impact ²
Signage and promotion	37,580	No Impact
Branch Courier	42,400	Increase by \$20,000 ³
Computer Services	716,750	Decrease by \$7,000 ⁴
Facility Costs	1,611,600	Impact of Asset Man. unknown
Furniture and Fixtures	39,010	Increase by \$10,000
Liability Insurance	54,460	No impact
Office and Operating Supplies	144,460	No impact
Photocopier Supplies	86,950	No impact ⁵
Postage/Freight	54,280	Decrease by \$7,000 ⁶
Security Services	217,350	Increase by \$10,000 ⁷
Telephone/Telecom	131,450	Increase by \$40,000 ⁸
Vehicle Expenses	67,110	Decrease by \$4,700 ⁹
Other contractual services	185,580	No Impact
Allocated costs	57,020	Decrease by \$57,020 ¹⁰
Internal debt charges	52,500	Decrease by \$52,500 ¹¹
Total	\$19,811,670	Decrease by \$48,220

Notes to Table 8

1. We have consulted with Human Resources. The new Hamilton Public Library will be required by Pay Equity legislation to re-evaluate its salary grid once the City pay scale has been established. There are significant pay differentials among the three library systems and pay equity costs, including the loss of the provincial subsidy to Wentworth, will be several hundred thousand dollars. The new City of Hamilton Public Library system will employ one less manager and will save the equivalent of the Dundas administration costs. Several current Hamilton Public Library management positions have been eliminated in order to move managers to growing suburban branches. We anticipate the need for additional paraprofessional staff members, although there is an attempt to contain costs by streamlining Technical Services. Salary costs could be contained by the closure of three branches although savings would not cover the anticipated effects of pay equity.
2. The combined materials budgets of the three current library systems provide a base budget that places the new library system in the midst of its comparators.
3. Other amalgamating library systems report considerable pressures on their courier services.
4. Includes computer leases for all staff and public service computers and all staff and public printers as well as the annual costs of the library automated system. As stated in our earlier report to the Transition Board, amalgamating the computer systems will save \$7,000.
5. Includes the operating cost of all public photocopiers.
6. Reflects postage savings resulting from the use of TeleCirc voice notification as outlined in the automation report to the Transition Board.
7. Reflects an anticipated increase in Security costs that allows response to all 26 library branches.
8. We have estimates from Hamilton Hydro for upgrading the communications links to rural branch locations.
9. Reflects the annual operating cost of the two bookmobiles and other vehicles. Eliminates the Wentworth Libraries van from Fleet.
10. Allocated costs include fees for administration and Human Resource services charged by the Region to Wentworth Libraries and by the Town of Dundas to the Dundas Public Library.
11. The Wentworth Libraries budget includes a debt repayment that concludes in 2000.

Budget Options

We have identified several opportunities for administrative savings. Closing the Wentworth Libraries Headquarters at 70 Frid Street and the introduction of the TeleCirc system (voice overdue and holds notification system) can be accomplished with no effect on the services to be provided by the new public library system. These two administrative savings, plus other smaller savings, amount to less than 1% of the proposed operating budget for the new library system. We do have several library Transition Teams looking at alternatives that may result in additional savings. The results of their work, primarily in Technical Services, will not be available until later in the summer.

It appears that if the new Hamilton Public Library is to operate all existing branch locations, even with reduced hours in some locations, there is a need for approximately 4 to 6 additional full time equivalent staff. The additional staff hours would not be needed by January 2001 or even, in all likelihood, by January of the following year. We would need additional staff to comply with normal CUPE contract requirements.

If the priority of the Transition Board is to maintain service at the current year's level, the Task Force proposes Recommendation #18A.

Recommendation # 18 A

That, unless additional budget savings can be found through the continuing operational review taking place throughout the summer, four to six additional F.T.E. staff be added to the staff complement at an annual cost of approximately \$220,000 to maintain library service at current levels.

Best Practice Findings...

Halifax Regional Library System has had to add staff to rural libraries to ensure equitable access and to establish strong community partnerships under the CAP funding programme.

If, however, the Transition Board determines that the priority is to keep the library staff size stable, we recommend that three branches be slated for alternative service delivery. These branches are: Picton, Sheffield, and Stoney Creek.

Recommendation # 18 B

That the Picton, Sheffield, and Stoney Creek library branches be designated for closure as they currently exist and that the new Hamilton Public Library Board be directed to provide library services to these neighbourhoods through alternative means.

The choice is based on the fact that schools extremely close to both Picton and Sheffield are slated to close and both already have low performance numbers. If the schools do close, (the Sheffield Branch is located on school property) branch performance will decline even more. The Stoney Creek Branch has declining performance numbers and it is now located closer to the new Saltfleet Branch of Wentworth Libraries, which opened early in 2000. Since we will not need the additional staff members until contracts are unified, we have an opportunity to search for alternative delivery mechanisms. For example, we know that much of the Picton business is directly related to the two local schools. A recreation centre is located a block from the current library location. By partnering with the school board and the recreation centre, we may be able to provide library services that meet the primary neighbourhood library need. The Stoney Creek Library provides an exceptional service to seniors and we are recommending an expanded role for both the bookmobile and VLS in the provision of services to seniors. It is possible that we can meet the needs of these individuals through the bookmobile service. The Sheffield Branch also has low performance numbers but it would be preferable to make changes in association with the implementation of a stronger Rockton Branch, expected in association with a municipal service centre in Rockton.

Summary of Recommendations

Recommendation 1

That the New City budget for the annual costs of a Customer Satisfaction Survey of an accurate sample of the population at large, and

That the New Hamilton Public Library be included with a limited number of questions in the survey instrument.

Recommendation # 2

That the City Manager establish a working group, based on the existing Library Transition Coordinating Committee and expanded to include, the City/Region Director of Corporate Communications, a representative from the Hamilton Street Railway, a representative of the Municipal Services Centre Task Force, and a representative from the Culture and Recreation Task Force, to prepare a project plan (including feasibility, timetable, and, if appropriate, an RFI) by July 14, 2000.

Recommendation # 3 (Already Approved)

That transition funds be approved to upgrade the TeleCirc module, allowing use of electronic notification in the New Hamilton Public Library.

Recommendation # 4

That the size of the Ancaster branch of the new library system be increased immediately in order to accommodate a public and staff computer training facility to be funded through a Community Access Program grant.

Recommendation # 5

That the construction of any new library facility take advantage of partnerships with other municipal departments and, where appropriate, with private sector partners in order to create a busier destination, save Capital costs, and reduce operating costs.

Recommendation # 6

That the Bookmobile and Visiting Library service criteria be changed to provide equitable access across the city for the elderly, disabled and low-income groups. Service will be provided within the current operating cost envelope.

Recommendation # 7

That there be no urban/rural differentials in the New Hamilton Public Library and no area rating of taxes levied for public library service.

Recommendation # 8

That four new Reserve Funds be established for the New Hamilton Public Library: Mobile Equipment, Collections, General Development, and Major Capital Projects, and

That the existing funds be incorporated into the new funds as appropriate, with the exception of the capital project reserve funds which should be retained for expenditure on either branch services in the area for which they were collected or on city-wide service development.

Recommendation # 9

That the New Hamilton Public Library establish a Collections Reserve Fund and that any surpluses or deficits in collection expenditure accounts in the Library's budget be added to or deducted from this Reserve Fund at year end.

Recommendation # 10

That the status of the Fundraising Fund (Dundas) and the Waterdown Library Fund (Wentworth) be changed from Reserve Funds to Trust Funds under the New City of Hamilton Public Library Board, and

That the monies in these funds be held for the purpose for which they were received as donations.

Recommendation # 11

That the new City of Hamilton Council pass a By-Law, under the *Public Libraries Act, R.S.O. 1990*, establishing a Hamilton Public Library Board no later than the third meeting of the new Council.

Recommendation # 12

That the Transition Board receive from the Library Board By-Law Transition Team, no later than September 30th, a proposed By-Law for the creation of a single library board for the New City.

Recommendation # 13 (Requires a Legislative Change)

That a legislative change to Section 9 (3) of the *Public Libraries Act, R.S.O. 1990* be sought from the Provincial government such that the City of Hamilton not be required to seek school board recommendations in appointing its public library board.

Recommendation # 14

That the Transition Board acknowledge the transition planning process already in place among the three public libraries and endorse the efforts of library boards, managers and staff generally to implement the service foundations outlined in the Library Task Force Report, and

That the process continue, and

That the Library Coordinating Committee provide a brief progress report through the City Manager in August, October and December of this year.

Recommendation # 15

That the three current library boards submit a proposal to the Transition Board by the end of November for the establishment of an Interim Library Board, if such an arrangement is deemed necessary.

Recommendation # 16 (Already Approved)

That the proposal from Epixtech, dated April 24, 2000, for a database / system merge and technology upgrade be approved, and

That, where applicable, the hardware required for the upgrade be submitted to bid for competitive pricing and leasing, and

That the purchase process be led by the Business Administrator of the Hamilton Public Library and implementation of the new system be managed by the Library Coordinating Committee (Chief Executive Officers of the three library boards), and

That the capital cost in the total estimated amount of \$422,038 plus taxes be funded from transition funds.

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That the Wentworth Library Board exercise the early termination arrangement in the lease of its Administration Office at 70 Frid Street.

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That, unless additional budget savings can be found through the continuing operational review taking place throughout the summer, four to six additional F.T.E. staff be added to the staff complement at an annual cost of approximately \$220,000 to maintain library service at current levels.

Recommendation # 18 B

That the Picton, Sheffield, and Stoney Creek library branches be designated for closure as they currently exist and the new Hamilton Public Library Board be directed to provide library services to these neighbourhoods through alternative means.

Conclusion

Public Satisfaction with Library Services

The public's relationship with the Public Library is noted in the book *Managing America's Cities: A Handbook for Local Government Productivity* by City Manager, Roger L. Kemp. He states:

The relationship of local libraries to citizens they serve warrants special mention. While many other city department managers are preoccupied with their internal operations, library directors have voluntarily sought out community support and funding for their programs.

One of the most positive encounters residents have with local government is using library services. Most city departments—police, fire and public works—are contacted only when there is a problem to resolve. One of the few municipal services that helps citizens personally satisfy their demands in a positive way is through the programs provided by local public libraries. For this reason, many citizens increasingly support the services provided by their community library.

The public is well satisfied with the Public Library. In survey after survey of government - provided services, the public library consistently rates second, second only to the fire department. There is a strong relationship of trust between a public library and its customer citizens; both sides have responsibilities if the service is to function effectively. The New Hamilton Public Library Board could lead with the establishment of a *Statement of Citizen Rights and Responsibilities at the Public Library*, defining what citizens can and cannot expect of the New Hamilton Public Library.

The public library is well used; 57% of local residents have library cards. Last year local residents borrowed an average of 11 items per person. One out of every ten children in Hamilton participated in one of the summer reading programs—one of the highest voluntary participation rates of any activity or minor league sport in the city.

The public library provides a sense of community. The local library branch is valued because it is a focal point for community, a source of local identity, and a community gathering point. This is as important as the services obtained at a library. The advent of more convenient online services has strengthened, not diminished, this role.

For many, the benefits of the public library are not measurable. The best way to demonstrate the intangible aspects of public library service is to quote the Newbery Award-winning Children's Author Cynthia Relant in her 1993 Acceptance speech:

I learned many things about public libraries that I have never forgotten. The most important thing I learned is that they are free. That any child from any kind of house in any kind of neighbourhood in this whole vast country may walk into a building which has a room full of books meant just for him and may choose whichever ones he wants to read and may take them home because they are free. And they are not free in a way which might diminish the child, not in the way of second-hand clothes or Salvation Army Christmas toys.

They are free in the most democratic and humane way. Both the poor child and the wealthy child are privileged with free libraries, and whenever they enter one, Make Way for Ducklings (Viking) will be sitting there waiting for them both.

List of Appendices

Appendix 1	—	Process for Library Transition Planning
Appendix 2	—	Overview of Services Provided Now
Appendix 3	—	Infrastructure Review
Appendix 4	—	Inventory of Equipment and Contracts
Appendix 5	—	Select Bibliography

Process for Library Transition Planning

As established by the Chief Executive Officers of the Dundas, Hamilton and Wentworth Libraries and approved by the three Library Boards

Process for Library Transition Teams

The Coordinating Committee

The Coordinating Committee's primary roles will be to determine issues to be covered by transition teams, to establish teams, to set goals and to monitor progress - providing each team with approval to proceed. The Coordinating Committee is composed of the CEOs of each current library. There are no proxies, although each CEO can assign another person to sit permanently on the Coordinating Committee. The Coordinating Committee may draw from other resources. Each meeting must include all three CEOs unless the one who will miss the meeting specifically gives permission for the business to be conducted in his or her absence. All three CEOs must approve policy, financial and/or service decisions that must be taken to the board(s).

The Role of the Library Board(s)

The three boards must approve any policy, financial or service decisions until and unless there is a process set in place for Transition Board decisions or for joint meetings of board representatives.

Before the First Step

The Coordinating Committee will establish the various transition teams and will identify the issue(s) to be handled by each transition team. For simple issues, teams could be as small as one person, although that person - as with all teams - must consult with staff from each merging system. Each team will be given a liaison person who is a member of the Coordinating Committee. The Coordinating Committee will set goals, determine a Chair for each team, set parameters, and establish time frames by which the goals will be met. The outline below indicates the steps that would have to be followed by a transition team that is dealing with a complex issue. By mutual agreement, the process can be shortened and streamlined for teams handling simple issues.

Step One: Initial Screen (Preliminary Investigation)

1.1. Determine a Vice Chair/Recorder;

1.2. Review the goals/assumptions and determine if any clarity is necessary. If so, seek clarity from the Coordinating Committee liaison person;

1.3. Compile all available information about the current practices of the three library systems as related to the goals;

1.4. Determine a mechanism for obtaining any additional information that might be necessary and collect that information (Where appropriate, contact the Hamilton Public Library Training and Planning Support Librarian for demographic and other information);

1.5. If the team does not include staff from each merging library system, develop a mechanism for continual consultation with each system;

1.6. Arrange contacts with selected external library systems that might have insights/suggestions needed to reach the goals (record findings);

1.7. Determine if there are any potential alternative service delivery mechanisms that might possibly be used (identify possibilities and roadblocks);

1.8. Determine likely means of reaching the goal(s) and list the strengths and weaknesses of each;

1.9. Determine which method of reaching the goal(s) will be recommended and why (include a conceptual assessment of technical feasibility and issues, staffing feasibility and issues, anticipated financial implications and the impact on existing services within each current service area).

1.10. Prepare a 5 - 10 page report listing the results of the investigation. Submit the report and tell the Coordinating Committee that your team is ready to present;

1.11. File a copy of the report on an Intranet site, with access available to other transition teams - as needed.

1.12. Meet the Coordinating Committee (prepare a 15 - 20 minute presentation and be prepared for questions). Within one working day the team will be told either that it may proceed to the next step, that the plan must go to the board(s) for approval (policy, service or financial impact) or that the team must provide additional information on explicit components of its report.

Decisions of the Coordinating Committee at this and all other steps will be available on an open Intranet site. Decisions will also be given to the Hamilton Public Library's Manager of Marketing and Communications to ensure that elements that should be communicated to staff and/or to the public are highlighted.

2. Step Two: Detailed Investigation (Build the Business Case)

2.1. Prepare market research information (customer values, preferences, choices, criteria, likes and dislikes, and tradeoffs). For some transition teams, this may be a part of Step One. For other teams, it may not be relevant. If the transition teams does not feel this to be relevant, it must receive permission from the Coordinating Committee to by-pass this portion of the process;

2.2. Using all of the information from the work in Step One and from the market research analysis, build a clear, focused draft business plan. The plan should include, where appropriate: use of technology, staffing implications, Capital one- time costs, impact on the operating budget, responsibility for the maintenance of the final product, a strategy for training all appropriate staff, a recommended time frame, and comments on potential public reaction and impact. The plan must take into consideration the current service levels within each existing municipality.

2.3. Prepare a 3 - 8 page report outlining the results of the market research, where determined relevant, and also prepare the draft business plan. Submit the report and the plan. Tell the Coordinating Committee that your team is ready to present;

2.4. Meet the Coordinating Committee (prepare a 15 - 20 minute presentation and be prepared for questions). Within one working day the team will be told either that it may proceed to the next step, that the plan must go to the board(s) for approval (policy, service or financial impact), that the team must provide additional information on explicit components of its draft business plan or that the work of the transition team is to be placed on Hold, pending service level direction by library board(s).

3. Step Three: Develop the Business Plan

3.1. Complete work on the business plan and begin the process of implementing the business plan: prepare, release and evaluate any RFI, RFO or RFP documents for Capital components, finalize staffing implications, ensure that all operating budget components are assigned to the proper departments and that the departments themselves understand and accept their responsibilities, and develop a detailed training plan.

3.2. Meet with the Hamilton Public Library Manager of Marketing and Communications if more public feedback is necessary or if there are elements of the plan that will require a public communications strategy. If such a strategy is required the Hamilton Public Library Manager of Marketing and Communications will provide the team with a launch strategy.

3.3. Meet with the Hamilton Public Library Training and Planning Support Librarian to review the training strategy.

3.4. Should work on the business plan reveal that former assumptions about cost or service impact are not accurate, the team will request a meeting with the Coordinating Committee.

3.5. Submit the complete business plan to the Coordinating Committee and tell them that your team is ready to present;

3.6. Meet the Coordinating Committee (prepare a 15 - 20 minute presentation and be prepared for questions). Within one working day the team will be told either that it may implement its plan, that the plan must go to the board(s) for approval (policy, service or financial impact), that the team must provide additional information on explicit components of its draft business plan or that the work of the transition team is to be placed on Hold, pending service level direction by library board(s).

4. Step Four: Implement the Strategy

4.1. The plan will be implemented either by the transition team or by specific departments/individuals, as outlined in the plan itself.

5. Step Five: Post-implementation Review

5.1. The transition committee will meet approximately six months after the business plan has been implemented in order to determine if the original assumptions and strategies were accurate and, if necessary, to recommend adjustments to the plan.

Evaluation criteria/questions to be asked of each transition team at each step will include:

- Do recommendations fit within the outlined goals?
- Is the plan consistent with directions/recommendations made by other transition teams?

- What is the impact on existing levels of service within each municipality?
- What is the likelihood of success?
- Has the transition team completed the tasks required to proceed to the next step?
- What are the costs?
 - Operating
 - Capital

Library Transition Teams

Library Transition Teams
Board By-laws
Board Composition/Representation
Bookmobile Services/VLS
Budget
Children's Services
Circulation and Public Use Policies
Collection Management
Courier
Electronic Services
Facilities/Maintenance
Graphic Identity
Hours of Operation
Library Automated System
Programming
Role Definition of Branches and Organizational Structure
Smart Cards
Staff Training
Technical Services

Overview of Current Services

This Appendix serves as a review of the existing public and support services of the Dundas Public Library, the Hamilton Public Library, and Wentworth Libraries. Dundas Public Library provides library service in a single location. Hamilton Public Library has, in addition to a large central library, nine branches and a Bookmobile service. Wentworth Libraries has one administration office location and fifteen branches.

Overview of Services in Common

Hours of Operation

Dundas Public Library is open 56 hours per week. Hamilton Public Library locations are open 41 – 66 hours per week with Sunday service from September to May. Wentworth Library locations are open 17 - 62 hours with a slight reduction during the summer. All three libraries provide 24/7 service through the on-line library catalogue, web site and on-line electronic resources. Book drops, open beyond library hours, allow for the convenient return of materials at any time.

Circulation of Materials

Materials loaned by all libraries include: books, magazines, talking books, CD's, and videos. Dundas and Hamilton offer records, CD-ROMs and vertical files. Hamilton also offers kits, pictures, sheet music and an extensive collection of material in many other languages. Loan policies vary by library system. The on-line catalogues, available through the Internet, enables customers of each library to check the status of their own transactions, place holds on materials, and have materials sent from one library to another within each library system. Wentworth and Hamilton Libraries have reciprocal borrowing privileges which enable card holders to have limited access to the use of the other system. As of June 2000 all restrictions for borrowing between all three libraries will be removed.

Information/Reference Service

All libraries provide information service that varies by size of library similar to the description of the Role Definition of branches described for the new library. Requests may be made in person, by telephone, fax, e-mail, or letter. The addition of the on-line catalogue and electronic information resources has enabled all library locations to better serve the needs of their customers, and has reduced the need for people to travel to another location for information.

All three libraries have several electronic resources, most of which are purchased through joint licensing agreements. These include such products as Electric Library, Ebsco, Health Reference, and World Book. Some of the larger libraries (e.g. Central, Terryberry) have additional products. The number of computers available for the public to use, varies by size of library. The trend is to purchasing of licenses that will enable card holders to use electronic

information products from home, school or work. For example, all library cardholders now have remote Web access to the Electric Library Canada.

Programs

The primary focus of the Hamilton Public Library's adult programs is on **public Internet and introductory computer skills** training in the Edward Mills Computer Training Facility. Book clubs have operated successfully for a number of years at several of the branches. Other programming is limited. Wentworth Libraries foster **book discussion groups** by providing reading sets, support materials and advice on how to conduct successful discussions. The new Saltfleet Library has a computer facility.

Children's Services are an integral part of any public library. The Hamilton Public Library offers comprehensive children's services for children of all ages from babies to teens. Literature-based pre-school programs introduce children to stories and simple songs and finger plays. **Pre-school programs** are targeted to different age groups including babies, toddlers, pre-schoolers, and families. **Class visits**, a 30+-year tradition, ensure that school age children are introduced to public library service. Each year, Grades 2, 4, and 7 classes are invited to their neighbourhood library. Four different **summer reading clubs** attract over 5,000 children each summer (10% of the children in the city). One programs "Reading Buddies," provides individualized assistance for children who need help in developing reading skills through the use of volunteers. Occasional programs are limited to March Break. Wentworth Libraries also offers literature-based storytimes programs for children. Like Hamilton Public Library's programs, they introduce children to stories and simple songs and finger plays. A summer reading program is designed primarily for school-age children to maintain their reading skills between school years. Although each library does these programs a little bit differently they each respond to community demand.

Community Partnerships

The development of community partnerships is a priority of the Hamilton Public Library as these have been a very effective method of delivering library-related services efficiently and cost-effectively. Examples of such partnerships include: the Family Literacy Network which is focusing on improving literacy levels for children at risk and whose membership includes colleges, universities, school boards, and Public Health. The Public Information Centre Hamilton-Wentworth (PIC Hamilton), a new web site/search engine created under the direction of the Hamilton Public Library staff, provides one-place-to-look information about government and non-profit services in Hamilton-Wentworth. The opening of two teen computer centres at Red Hill and Terryberry libraries was made possible with a partnership with Human Resources Development Canada.

All three Libraries have been founding members of the Hamilton-Wentworth Information Network (HWIN) which was responsible for developing the region-wide electronic network and the purchasing of joint licenses for products.

Visiting Library Service (VLS)

Both Dundas and Hamilton Public Library deliver materials to the "frail elderly" in their home. Dundas uses volunteers for the delivery, while Hamilton staff do the delivery. In both libraries selection is done by staff. Hamilton VLS staff also maintain deposit collections at 50 long-term care facilities or retirement homes.

Historical Collections

The Dundas Archives houses the collection related to the historical development of the Town of Dundas. The staff maintain and make accessible two years of Town Minutes and some Town By-laws. The Hamilton Public Library Special Collections houses the collection related to the historical development of the City of Hamilton and the Hamilton-Wentworth region. The Special Collections Department maintains and makes accessible the archival records of both the City of Hamilton and the former County of Wentworth which goes back over 200 years. In both libraries, staff resources are particularly directed to the information needs of researchers, genealogists, students, and interested individuals seeking specialized historical information

Automated Functions and Electronic Information Product Support

At Wentworth Libraries, the information technology infrastructure of the library system is included with Technical Service Functions. Responsibilities include: the automated collection control system (DYNIX); the wide area network (servers and both public and staff workstations), and internetworking, software implementation and voice telephone installations. The Hamilton Library Automated systems staff performs similar functions but also ensures that the public and staff have access to a variety of information databases. They also configure and secure software on public and staff computers, train staff in the use of software applications, and train the public to use the Internet. Each staff works closely with the City of Hamilton's Network Operating Centre for network support.

Technical Services Department

Each library has a Technical Services Department responsible for the acquisition, cataloguing, and processing of all library materials for the system including the ordering, receiving, and financial transactions; cataloguing, creating, and maintaining bibliographic records in the database and the holding records, and packaging materials for circulation.

Services Unique to one Library

Bookmobile (Hamilton Public Library)

The bookmobile service, which currently provides service to three user groups: seniors, day cares, and neighbourhoods at 47 locations city-wide is redefining its role to meet the needs of the new City of Hamilton and the increased numbers of seniors who have indicated an interest in bookmobile or Visiting Library service.

Disability Information Service Helpline (D.I.S.H.) (Hamilton Public Library)

D.I.S.H. is a telephone and drop-in information service that provides information, referral and guidance to people with disabilities, their families, professionals, and others. The staff provides hard-to-find information on topics such as government services, agency programs, and technical aids and devices. This service, which operates out of the Resource Centre for Disabled Persons and is partly funded by the Hamilton Health Sciences Corporation (Rehabilitation Services), was established in 1986 as a community partnership initiative.

The Learning Centre (Hamilton Public Library)

The Learning Centre, located on the fourth floor of the Central Library, has a large collection of materials for people who have literacy needs as well as for students who are learning English as a second language. A Language Instruction for Newcomers to Canada (LINC) program operates in the Centre. This program helps new immigrants to improve their speaking,

listening, conversation, and writing skills, as well as to introduce them to Canadian culture and prepare them for citizenship. The federal government funds this program. Again the need for this service was identified by a community partnership initiative.

QUIC Information Centre (Hamilton Public Library)

A telephone information service that offers quick, factual information from a variety of reference tools, QUIC also acts as the initial point of contact for users seeking information at the Central Library.

Support Services

While not visible to the public, these functions are basic to a effective public service organization. In this area, the relative sizes of the three library systems become evident. Dundas and Wentworth multi-task many functions under general administration. The Hamilton Public Library is large enough to have specialist work units.

Administration

The Dundas Library administrative functions are divided by the CAO of the Town of Dundas and a staff member of the Library. The Town of Dundas handles HR and business functions.

At the Wentworth Libraries, administrative functions are highly centralised. Public Services management is also centralised. Branch services are managed and co-ordinated through policy interpretation and staff training. Back-up in both service and personnel matters is provided for branch supervisors. General administration includes:

- Service planning
- Financial administration
- Preparation of operating and capital budgets
- Preparation of reports, etc.
- Management of goods and services
- Human resources management and the application of the personnel policy
- Job postings and candidate selection
- Pay administration and pay equity matters
- Work hour, payroll and benefit record-keeping
- Preparation of publicity, displays, etc. for internal use.

Because of its larger size Hamilton Public Library administrative support is organised by departments including:

- the Business Department which administers the financial affairs of Hamilton Public Library.
- the Community Relations Department provides a variety of support functions including publicity of Library events and services, establishment and maintenance of standards for corporate identity and signage, forms management, web site, room bookings, support for the Friends of the Library, display and design services supporting public service initiatives, etc.

- The Human Resources Department's major responsibilities include interpretation and maintenance of the collective agreement, job evaluations and postings, pay equity issues, payroll and benefit preparation, and interviews.

Courier Service

At Hamilton Public Library, the movement of library materials between locations is done daily using a contracted courier and van. A staff person who is also responsible for other tasks including block rotations or minor repairs does delivery among the 16 locations of Wentworth Libraries three times a week.

Maintenance and Cleaning Functions

At Hamilton Public Library, there are maintenance staff at Central Library and some branches. Cleaning is contracted to a janitorial firm for the Central Library and those branches without a maintenance person. The Business Office handles contracts for major work such as building repair. At Wentworth Libraries, the municipalities contract for janitorial work in the branches with minor special exceptions. Municipal employees usually do maintenance work on buildings and the municipalities contract for major work such as carpeting or roof repair. The library handles minor maintenance to furnishings.

Use of Volunteers

Dundas Public Library uses volunteers for delivery of its Visiting Library Services and Friends of the Library initiatives. Hamilton Public Library uses volunteers for the "Reading Buddies" program, ESL tutoring with the Language Instruction for Newcomers to Canada (LINC) program which operates out of the Learning Centre, and Friends of the Library initiatives. Volunteers are used at Wentworth Libraries on a very limited basis appropriate to the severe constraint of staff time available to supervise them. Volunteers at the Ancaster Branch do minor mending of collection items and special placement volunteer works at all four branches in Stoney Creek.

Infrastructure Review

The Table below shows a compilation of the responses made by the three library systems to the Annual Survey of Public Libraries 1999, a submission required by the Ontario Ministry of Citizenship, Culture and Recreation. The Survey uses standard definitions of terms and reported figures can be combined, therefore, with some confidence in the integrity of the resulting information.

	Dundas	Hamilton	Wentworth	Combined Total
GENERAL INFORMATION				
Number of Service Points				
Permanent locations	1	10	15	26
Mobile library stop locations	0	22	0	22
Total service points	1	32	15	48
Number of library cardholders	12,892	195,678	57,456	266,026
HOLDINGS				
Print Materials				
Catalogued English volumes	86,401	667,540	294,671	1,048,612
Catalogued French volumes	221	7,583	939	8,743
Catalogued Other volumes	111	18,688	175	18,974
Total volumes held	86,733	693,811	295,785	1,076,329
Catalogued reference titles	1,218	43,927	2,696	47,841
Uncatalogued print volumes	25	255,857	62,841	318,723
Periodical titles	135	1,525	167	1,827
Uncatalogued material in linear metres	3.65	350.00	29.40	383.05
Microfilm Materials				
Periodical titles	323	N/A	0	323
Other titles	0	N/A	0	0
Total titles	323	N/A	0	323
Audiovisual Materials				
Sound recording titles	1,218	32,390	5,762	39,370
Compact disc titles	1,033	15,728	5,069	21,830
Talking book titles	1,107	6,835	1,405	9,347
Videodisc/laserdisc titles	0	212	0	212
Video tape titles	3,001	21,077	8,982	33,060
Other format titles	0	5,715	0	5,715
Total AV materials held	6,359	81,957	21,218	109,534

	Dundas P. L.	Hamilton P. L.	Wentworth L.	Combined Total
Computer Readable Materials				
CD-ROM titles	20	2,261	1	2,282
Diskettes	16	0	0	16
Other	0	0	7	7
Total computer readable titles held	36	2,261	8	2,305
Reference titles included in total above	4	0	8	12
Full text titles included in CD-ROMs above	22	0	1	23
Full text titles included in diskettes above	15	0	0	15
Full text titles included in Other above	0	1,040	1,679	2,719
Total full text titles included above	35	1,040	1,680	2,755
Local information databases	0	1	0	1
Other				
Other format titles not included elsewhere	200	162	0	362
Depository status—Federal publications	Selective	Full	Selective	
Depository status—Provincial publications	Selective	Full	Selective	
LOAN TRANSACTIONS (Annual)				
(Note that Wentworth uses a longer loan period)				
AV circulation				
Sound recordings	5,376	132,455	81,736	219,567
Compact discs	6,254	129,021	44,277	179,552
Talking books	654	13,514	1,096	15,264
Videodiscs/laserdiscs	0	907	0	907
Videotapes	35,381	432,931	118,055	586,367
Total AV	47,665	708,828	245,164	1,001,657
Circulation of computer readable materials	3,948	26,002	0	29,950
Direct circulation of ALL materials (including above)	295,870	3,513,088	1,020,569	4,829,527
Annual bulk loans				
Provided	0	35,764	0	35,764
Received	0	400	0	400
Annual interbranch bulk transfers	0	80	41,400	41,480
In-library materials use	51,965	1,586,885	184,296	1,823,146
Interlibrary loans				
Borrowed	768	779	437	1,984
Lent	1,608	3,203	1,610	6,421

	Dundas P. L.	Hamilton P. L.	Wentworth L.	Combined Total
REFERENCE REQUESTS				
Reference requests for sample week	479	11,520	2,947	14,946
Annual reference requests (by standard formula)	26,765	600,359	150,992	778,116
LIBRARY USES				
Sample week counts				
People entering	3,136	51,792	10,709	65,637
Telephone requests	156	2,755	1,029	3,940
Fax & electronic requests	79	18	152	249
Mail requests	0	12	1	13
Dial-in PAC access	6	2,114	357	2,477
Total uses for sample week	3,379	56,691	12,248	72,318
Annual library uses (by standard formula)	188,697	2,954,421	627,538	3,770,656
Programs				
Program attendance	6,351	44,114	3,900	54,365
Internet classes/tutorials	0	N/A	0	0
INFORMATION TECHNOLOGY AND REMOTE ACCESS				
Number of computer terminals/workstations	28	375	92	495
LIBRARY PHYSICAL FACILITIES				
Net area in square metres				
Main library	1,199	15,136	N/A	16,335
All other service points	0	9,263	4,214	13,477
Total area	1,199	24,399	4,214	29,812
Seats available to library users				
Main library	N/A	615	N/A	615
All other service points	N/A	442	453	895
Total seats	N/A	1,057	453	1,510
REGULAR LIBRARY HOURS				
Weekly open hours				
Main library	56	66	N/A	122
All other service points	0	427	507	934
Total weekly hours of dial-in access	168	168	147	483

	Dundas	Hamilton	Wentworth	Combined Total
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LIBRARY PERSONNEL

Positions Filled (Not staff complement) in FTE's

Professional librarians	2.00	43.00	4.00	49.00
Professional accreditation in other fields	1.00	4.00	0.00	5.00
Library or AV technicians	1.00	36.50	12.81	50.31
Other staff	9.30	167.50	24.55	201.35
Total staff	13.30	251.00	41.36	305.66

Number of volunteers	14	600	6	620
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FINANCES—REVENUES

Balance brought forward from previous year	\$ 17,510	\$ -	\$ -	\$ 17,510
Provincial grants				
Per household	39,193	727,255	273,071	1,039,519
Special	4,519	123,152	209,303	336,974
Municipal contributions for				
Operating	637,130	14,517,502	2,317,680	17,472,312
Debt services	0	0	0	0
Contract receipts	0	0	0	0
Donations	8,336	33,089	65	41,490
Other grants	5,543	442,252	0	447,795
Transfers from reserve funds	20,000	0	433,360	453,360
Other current revenue				
Lending material	67	0	329	396
Rental revenue				
Equipment	0	64,695	0	64,695
Space	250	33,407	0	33,657
Fines	24,532	299,205	89,604	413,341
Damages recovered	0	0	6,276	6,276
Non-resident fees	4,936	20,366	1,846	27,148
Programs and events	12,019	0	4,350	16,369
Miscellaneous	14,493	7,488	12,279	34,260
Total Current Revenue	<u>\$ 771,118</u>	<u>\$ 16,268,411</u>	<u>\$ 3,348,163</u>	<u>\$ 20,387,692</u>

	Dundas	Hamilton	Wentworth	Combined Total
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FINANCES—EXPENDITURES

Note- Wentworth opened a new branch in 1999

Salaries and wages

Library staff - public service	\$ 367,541	\$ 8,160,174	\$ 1,014,589	\$ 9,542,304
Library staff - support services	28,584	2,223,702	381,054	2,633,340
Student staff and work programs	78,810	441,452	0	520,262
Maintenance staff	28,901	408,258	0	437,159
Total salaries and wages	503,836	11,233,586	1,395,643	13,133,065

Library materials

Books	56,304	899,018	409,301	1,364,623
Print serials	19,224	368,150	25,535	412,909
Sound recordings	2,590	47,741	37,739	88,070
Compact sound discs	0	36,242	33,950	70,192
Talking books	2,110	18,045	2,689	22,844
Videodiscs	0	0	0	0
Video tapes	4,664	75,073	41,694	121,431
Computer readable materials	0	217,076	28	217,104
Microform materials	0	3,971	0	3,971
Other materials	390	10,227	0	10,617
Total library materials	85,285	1,675,543	550,936	2,311,764

Other expenditures

Payments to library boards	1,550	0	0	1,550
Internet and online services	1,080	4,091	23,104	28,275
Acquisitions, cataloguing, processing payments	19,150	49,886	59,436	128,472
Other services	12,311	586,926	72,743	671,980
Supplies & equipment	0	378,695	403,536	782,231
Other expenditures	89,141	1,864,217	414,627	2,367,985
Total operating expenditures	712,343	15,812,944	2,920,025	19,445,312

Other

Debt charges	0	0	73,757	73,757
Transfers to reserve fund	76,275	455,467	354,381	886,123
Returned to government sources	0	0	0	0
Total	76,275	455,467	428,138	959,880

Total current expenditures	<u>\$ 788,628</u>	<u>\$ 16,268,411</u>	<u>\$ 3,348,163</u>	<u>\$ 20,405,202</u>
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Inventory of Equipment and Contracts

The Task Force has identified major equipment, computer and contract items. Detailed information will be pursued as necessary in the implementation of the new Library system's operation.

Major Equipment Owned and Leased

Equipment Type	Library	Number
Card Reader	Hamilton	<ul style="list-style-type: none"> 1 Cash Card Manager 9 Mini Transaction Tills 35 Cash Card Readers
Fax Machine	Dundas Hamilton Wentworth	<ul style="list-style-type: none"> 1 13 3
Laminator	Hamilton Wentworth	<ul style="list-style-type: none"> 1 1
Microfilm	Dundas Hamilton	<ul style="list-style-type: none"> 1 reader 1 reader printer 4 readers 6 reader/printers
Microfiche Reader	Dundas Hamilton	<ul style="list-style-type: none"> 1 1
Photocopier	Dundas Hamilton Wentworth	<ul style="list-style-type: none"> 2 22 16
Offset Press and Plate Maker	Hamilton	<ul style="list-style-type: none"> 1 each
Vehicles	Hamilton Wentworth	<ul style="list-style-type: none"> 4 1-1995 Ford Cargo Van, 1-1995 Ford Window Van, 1- 1990 Ford/Thomas Bookmobile, 1-1992 Ford/Thomas Bookmobile 1 1997 Dodge Van (part of regional fleet)

Computer and Related Equipment

Equipment Type	Library	Total	# Leased	# Owned
Computers	Dundas	18	0	18
	Hamilton	397	356	41
	Wentworth	35	0	35
Thin Client Workstations	Hamilton	45	0	45
	Wentworth	96	0	96
Dumb Terminals	Dundas	8	0	8
	Wentworth	3	0	3
CD-ROM Tower	Hamilton	2	2	1
Digital Camera	Hamilton	1	0	1
	Wentworth	1	0	1
Laptops	Hamilton	3	3	1
	Wentworth	2	0	2
Palm Pilot	Hamilton	6	0	6
Printers	Hamilton	199	199	0
	Wentworth	40	0	40
Scanners	Hamilton	4	0	4
	Wentworth	1	0	1
Servers	Hamilton	15	9	6
	Wentworth	4	0	4
Tape Back-Up Units	Hamilton	1	0	1
	Wentworth	3	0	3
UPS	Hamilton	4	0	4
	Wentworth	11	0	11

Contracts, Leases, and Agreements

Service	Library	Company Name	Expiry
Alarm System	Hamilton Wentworth	Counterforce Honeywell (Administration office)	Renewed every three months 09/01/02
Automated System Support	Hamilton Wentworth	epixtech epixtech	Renewed annually Renewed annually
Beverage Machines	Dundas	Café Novelle	2004 (signed through town)
Book Hoist	Hamilton	Mathews Conveyor	04/30/01
Branch Libraries/Office Space	Hamilton Wentworth	DeMarchi Construction Ltd.(Picton Branch lease) Mayfair Properties Inc. (Red Hill Branch lease) Norold Holdings Corporation (Sherwood Branch lease) Sandona (Main office)	09/01/99 –08/31/01 11/01/99 – 10/31/04 01/01/90 – 12/31/10 10/31/02
Cleaning	Hamilton Wentworth	Crystal Scooter's (Administration office)	12/31/00 Upon 2 month's written notice
Communications	Wentworth	Various vendors	Minor contracts
Computers	Hamilton	CompuSmart Computer	Computers – 3 year warranty Printers – 1 year warranty
Courier	Hamilton	Medcos Courier	12/31/00
Elevator	Dundas Hamilton	Otis Otis (Central) Otis (Kenilworth Branch) Otis (Terryberry Branch) Safeguard (Sherwood Branch) ThyssenDover (Concession Branch)	02/28/01 contract through City Hall 06/30/00 05/31/00 02/28/01 04/30/01
Fibre-Optics	Hamilton Wentworth	Cogeco FibreWired (Hamilton Hydro)	09/01/97 – 08/31/02 09/15/04
Heating and Cooling	Dundas Hamilton	Wolmers Boonstra (Concession Branch)	02/ 2001 03/31/01
Internet Access & Information Technology	Hamilton Wentworth	McMaster University Hamilton Public Library	Renewed annually Renewed annually
Network Services	Dundas Wentworth	Landscapes Avita	Renewed annually No formal expiry date
Photocopiers	Dundas Hamilton Wentworth	Canon Canon and Toshiba Ikon	Maintenance contract only 10/31/00

Service	Library	Company Name	Expiry
Plant Maintenance (interior)	Hamilton	Urban Green	Upon 1 month's written notice
Plumbing	Dundas	Pollards	Service only
Postage	Wentworth	Pitney Bowes	Renewed quarterly
Property Maintenance	Dundas Hamilton	Plantscheme McCoy	09/00 (snow removal) 04/2000 (snow removal) 15/10/00 (lawn)
Security	Hamilton	Hamilton-Wentworth Protection Services	Renewed annually
Security Gates	Hamilton	Checkpoint Canada	Renewed annually
Server Support	Dundas	Landscape	Renewed annually
Storage Space	Hamilton	Canadian Football Hall of Fame (Special Collections) DeMarchi Construction Ltd. (system storage)	12/01/98 – 30/11/03 09/01/99 – 08/31/01
Trust Fund Management	Hamilton	Hamilton Community Foundation	
Window Cleaning	Hamilton	Reflections (Central) Skybright (Branches)	

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