

## A C T I O N

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**Subject:** 2012-2015 OPL Strategic Plan

**Prepared by:** Barbara Clubb, City Librarian on behalf of Patrick Gauch, Chair, Governance and Audit Committee

**Prepared for:** Ottawa Public Library Board

**Meeting of:** December 12, 2011

**Date:** December 9, 2011

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### RECOMMENDATIONS:

#### 1. That the Board adopt as its mission:

*To build a strong Ottawa community by supporting life-long learning and 21<sup>st</sup> century literacies, fostering inspiration and enjoyment and connecting people to each other and the world.*

#### 2. That the Board adopt as its values:

**Access and Inclusion:** *we are committed to providing basic services to every person in Ottawa free of charge, and to providing barrier-free facilities, resources and services.*

**Accountability:** *we are responsible for meeting the library service needs of the community in an efficient, effective and fiscally responsive manner.*

**Bilingualism:** *we provide a strong bilingual context in English and in French for our resources and services.*

**Dynamic Workforce:** *we promote a stimulating work environment that recognizes and rewards staff creativity in serving the people of Ottawa.*

**Innovation:** *we continuously review current practices, make improvements, leverage technology and create new standards of performance to drive service improvements.*

**Intellectual Freedom:** *we defend the rights of library users to freedom of thought, belief, opinion and expression as the basis of a democratic society.*

**Love of Reading:** *we nurture the joy of reading in people of all ages.*

**Right to Privacy:** *we respect and protect the privacy of our users.*

***Service Excellence:** we excel in customer-driven service and provide welcoming and expert service supportive of human differences.*

***Informed Community:** we believe that Ottawa's future economic and social prosperity depends on ensuring that all of our citizens are well informed and supported in their aspirations to learn throughout their lifetimes.*

**3. That the Board adopt the attached Draft OPL Strategic Plan 2012-2015 as the basis for publication of a final document.**

**References:**

1. Doc. 03 (b), Governance and Audit Committee Report to the OPL Board: Proposed approach to the 2012-2015 OPL Board Strategic Planning Program and Process
2. Draft Strategic Plan for Ottawa Public Library 2012-2015, November 30, 2011
3. Market Probe Presentation, November 30, 2011
4. Environmental Scan for Ontario Public Libraries, Southern Ontario Library Service, November 2011

**Background**

At its meeting in May 2011, the OPL Board approved the proposed strategic planning approach, as submitted by the Governance and Audit Committee. The OPL Board identified the development of a new plan as a top priority. The 2008-2011 plan was comprehensive, with the aim of enabling the Library to support emerging needs in Ottawa and advance civic priorities. Yet, over the course of the next few years, it was clear that there would be changes and developments that would impact how the OPL delivered its core services in the immediate future. Most notable:

- Increasing availability and demand for digital products
- Improvements in technologies that will streamline processes
- Fiscal constraints in which we now operate

Since the plan was designed to build on previous planning exercises and consultations, the following assumptions within the planning process for the 2012-2015 plan were made:

1. The OPL would not be doing major re-writes of mission and values, and
2. The framework of the plan would not fundamentally change

The key elements of the strategic planning renewal process included:

- Taking stock of the Library's current strategic situation, confirming the progress it has made and the strategic issues the Library now faces
- Reflecting on the implications of recent research that has been conducted for leading libraries in North America
- Reviewing and confirming or refining the current mission and values
- Reviewing and confirming or refining the current strategic directions
- Defining key areas of focus for the next four years
- Linking with the City's planning processes and City Council's Priorities
- Reviewing and refining performance metrics – including the development of a Balanced Scorecard for the Library

The planning process for the development of this Strategic Plan began with a strategic review. The review included:

- Assessment of the Library's progress in implementing its 2008 to 2011 Strategic Plan which was documented in the Ottawa Public Library Board's Legacy Report: "Creating a Learning and Literate Community" (June 2011)
- Analysis of a broad range of local and global data on demographic, social, economic, technological and library trends as well as a review of the recently published Southern Ontario Library Service Environmental Scan for Ontario Public Libraries (November 2011)
- Analysis of Ottawa Public Library statistics and performance indicators, as well as a number of recently completed studies including:
  - Past Quarterly Performance Measurement Reports
  - Past OPL Annual Reports
  - Francophone Needs Assessment, Phoenix Strategic Perspectives, April 2011
  - OPL Needs Assessment, Phoenix Strategic Perspectives, December 2008
- Review of the City's strategic priorities and objectives and identification of potential linkages with the Library's work
- Meetings with the Ottawa Public Library Board and the Board's Governance & Audit Committee to assess the Library's current strengths, weaknesses, opportunities and threats and identify strategic issues for 2012 to 2015.
- Survey to enable staff and public to provide feedback

All of the above information was considered and used to support the strategic plan development phase. A key input to the strategic plan development has been a study of library usage and attitudes of a representative sample of Ottawa residents carried out by Market Probe in October 2011. This survey covered the same topic areas and questions as the 2010 Federation of Ontario Public Libraries (FOPL study), which profiled all Ontario residents. From the results of the survey, it is clear that traditional library services remain a high priority for Ontario residents, given the evolving role of technology.

Preliminary strategic directions were developed and reviewed with internal stakeholders including the Ottawa Public Library Foundation, the Friends of the Ottawa Public Library, and a cross-section of management and staff. The draft strategic directions are currently being shared on the website along with a feedback form. Members of the public and staff have been encouraged to fill out an online survey meant to gauge their impressions. This input will be used to make final refinements to this plan.

In preparation for the approval of the plan, Ms. Wright, Wright Management Consulting will be present at the December Board meeting to facilitate a discussion hopefully leading to the adoption of the strategic plan.

### **Next Steps**

Upon approval by the Library Board, staff will have the document translated and designed for web and print publication. All design elements will be incorporated with the help of OPL's Communications and Community Relations Department. Please note, the final document will include:

- A letter of introduction from the Chair and the City Librarian
- Additional quotes (Voices of Our Customers)
- Key facts and figures
- Photographs

### **Attachment**



# A Strategic Plan for Ottawa Public Library 2012-2015

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December 12, 2011

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A STRATEGIC PLAN FOR OTTAWA PUBLIC LIBRARY  
2012-2015

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## 1. Introduction

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### *Relevant and Vital Services and Spaces... Enabled by a Commitment to Engagement, Innovation, and Excellence*

The Ottawa Public Library's draft 2012-2015 Strategic Plan puts our customers and communities front and centre – ensuring that Library services are relevant, accessible and customer-centric, and library places and spaces are vital and welcoming community hubs. Now, more than ever, plans for the next four years cannot be about doing more of the same. Innovation, through the application of technology and a commitment to continuous improvement, is essential – especially in a time of fiscal restraint and rapid technological change. Excellence and a focus on strong governance, accountability and fiscal sustainability will guide all that we do. As we move forward, engagement of our customers, communities, partners, employees and volunteers will drive, shape and support our strategic plan, which builds on the fundamental roles that the Library plays in Ottawa today.

**The Library provides relevant and vital resources, services and spaces.**

Residents, entrepreneurs and visitors come through our doors and visit our website for many reasons. The Library meets the needs of our diverse population, which ranges from young families and children to a growing number of seniors.

**The Library helps build a stronger community and supports economic prosperity in Ottawa** by providing free and equitable access to information for all residents. We support life-long learning and 21<sup>st</sup> century literacies in multiple ways. We foster inspiration and enjoyment through our collections and programs. We also connect people to each other and to the world by providing them with both physical space and access to the vast range of information available today.

**We are a cornerstone of our communities.** Our branches are welcoming community hubs and vital civic spaces that serve many roles: providing spaces to read, learn, discover, and reflect; welcoming and integrating new residents from all over the world; and offering room for people to meet and work together to build a stronger community.

**Our employees play vital roles** in helping people access quality information to support their learning, their work and their private lives. Our staff are engaging youth in new ways, and inspiring a love of learning and reading among all age groups, particularly young children.

**The Library is continually innovating to ensure that everyone has access to e-resources and technology and can develop the 21<sup>st</sup> century digital literacy skills required to participate in an online world.** Ottawans can access valuable online information through our website, on our public computers or through each branch's wireless service.

Research suggests the great cities of the 21<sup>st</sup> century will thrive because of their innovation and creativity, human resources, quality of life, positive business climate, physical infrastructure and effective governance. *There is growing recognition across North America that libraries play a strong role in building communities and local economies.* Wendy Newman, former public library director and currently a Senior Fellow in the Faculty of Information at the University of Toronto, notes:

*The public library of 2020 will respond to a new social, technological, and economic environment while keeping its enduring values. It will use new tools and partnerships in its traditional roles as part of a lifelong learning system and as an engine of cultural and economic development. It will remain an agent and sign of community and social cohesion. It will respond to Canada's uniquely "diverse diversity." It will act on research on reading and learning and make information and communication technology accessible in a democratized and participatory digital universe of uneven quality. It will stimulate creativity in the community and provide exciting public spaces where people can participate and share ideas.*

*Through all these means, the public library will contribute to sustainable prosperity for Ontario and Canada in an increasingly knowledge-based economy.*

*Third Generation Public Libraries - Visionary Thinking and Service Development in Public Libraries (to 2020) and Potential Application in Ontario, Wendy Newman, 2008.*

**The Ottawa Public Library is poised to play an active and responsive part in advancing our city over the next four years by:** enhancing economic prosperity and quality of life; furthering its long term sustainability goals; and supporting City Council priorities. We look forward to working with our community and our partners to develop and implement our strategies for the next four years.

## 2. Planning Process

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Our approach to planning at the Ottawa Public Library ensures that we have a clear and dynamic blueprint for our future. Our planning cycle enables us to continue to be attuned to our changing environment and evaluate our progress. Each year we develop a strategic work program which outlines in detail how we will implement our high-level strategic directions.



The planning process for the development of this Strategic Plan began with a **Strategic Review**, which included:

- assessment of the Library's progress in implementing its 2008 to 2011 Strategic Plan, as documented in the Ottawa Public Library Board's Legacy Report: *Creating a Learning and Literate Community* (June 2011);
- analysis of a broad range of local and global data on demographic, social, economic, technological and library trends, as well as a review of the recently published Southern Ontario Library Service Environmental Scan for Ontario Public Libraries (November 2011);
- analysis of Ottawa Public Library statistics and performance indicators, as well as a number of recently completed studies;
- examination of the City's strategic priorities and objectives, and identification of potential linkages with the Library's work; and
- meetings with the Ottawa Public Library Board and the Board's Governance & Audit Committee to assess the Library's current strengths, weaknesses, opportunities and threats, and identify strategic issues for 2012 to 2015.

All of the above information was factored into the Strategic Plan Development phase. Another key input was a study conducted by Market Probe in October 2011, about library usage and the attitudes of a representative sample of Ottawa residents. This survey covered the same topic areas and questions as the 2010 Federation of Ontario Public Libraries (FOPL study), which profiled all Ontario residents.

Preliminary strategic directions were developed and reviewed with internal stakeholders, including the Ottawa Public Library Foundation, the Friends of the Ottawa Public Library, and a cross-section of management and staff. The draft strategic directions were also shared on the Ottawa Public Library website along with a feedback form for public and staff input. This input was used to make final refinements to this plan.

### 3. Mission and Values

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#### Mission

*To build a strong Ottawa community by supporting life-long learning and 21<sup>st</sup> century literacies, fostering inspiration and enjoyment and connecting people to each other and the world.*

#### Values

**Access and Inclusion:** we are committed to providing basic services to every person in Ottawa, free of charge, and to providing barrier-free facilities, resources and services.

**Accountability:** we are responsible for meeting the library service needs of the community in an efficient, effective and fiscally responsive manner.

**Bilingualism:** we provide a strong bilingual context in English and in French for our resources and services.

**Dynamic Workforce:** we promote a stimulating work environment that recognizes and rewards staff creativity in serving the people of Ottawa.

**Innovation:** we continuously review current practices, make improvements, leverage technology and create new standards of performance to drive service improvements.

**Intellectual Freedom:** we defend the rights of library users to freedom of thought, belief, opinion and expression as the basis of a democratic society.

**Love of Reading:** we nurture the joy of reading in people of all ages.

**Right to Privacy:** we respect and protect the privacy of our users.

**Service Excellence:** we excel in customer-driven service and provide welcoming and expert service supportive of human differences.

**Informed Community:** we believe that Ottawa's future economic and social prosperity depends on ensuring that all citizens are well informed and supported in their aspirations to learn throughout their lifetimes.

## 4. Strategic Directions 2012 - 2015

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### Overview of our Draft Strategic Directions

For more than 100 years, the Ottawa Public Library and its predecessor libraries have served the residents of Ottawa. Throughout our history, we have worked diligently to meet the needs of our communities. Our track record is strong. From 2007 to 2010, the total number of uses of library services grew by 46%, while in-person visits to the Library grew by 23% and electronic visits grew by 147%.

The next four years will be a time of unprecedented change – as customer and community needs continue to evolve, as information technology continues to change how we access and share information, and as fiscal restraint requires us to find new and innovative service solutions. Our strategic directions for 2012 to 2015 focus on:

Relevant and Vital Services and Spaces ...	
A. SERVICES that are Relevant, Accessible and Customer-Centric	B. PLACES and SPACES that are Vital, Welcoming Community Hubs

... Enabled by a Commitment to Engagement, Innovation and Excellence		
C. ENGAGEMENT of Customers, Communities, Partners, Employees and Volunteers	D. INNOVATION through Technology and Continuous Improvement	E. EXCELLENCE in Governance, Accountability and Financial Sustainability

## A. SERVICES that are Relevant, Accessible and Customer-Centric

### Background:

Our recent performance statistics tell a powerful story. In 2010, there were more than five million in-person visits to the Library, more than 10 million items borrowed, and more than 12 million electronic visits to the website (OPL Statistics, 2010). A recent survey reports that almost seven in 10 Ottawa adults visited the Library in a 12 month period – a slightly higher proportion than Ontario adults in general. Many of our users are Internet savvy and technologically adept – accessing information via the Library’s web site, downloading e-books and audiobooks, and coming to branches to access public computers and wireless service. At the same time, users still consider the Library as a lender of materials, a reference centre, a provider of early literacy programs and a place to get assistance in finding information (Market Probe, Ottawa Public Library Survey Final Report, November 2011).

But at the Ottawa Public Library, we want to be more than just a valued service provider: we want to inspire, inform and enable the citizens of tomorrow. The strength of our community depends on having an informed citizenry, and individuals, business people and organizations can best become well-informed by having efficient access to the Internet. E-book sales are now outselling print books (Southern Ontario Library Service SOLS Environmental Scan, 2011).

The next four years will see a continuing transformation in how people read, access information and carry out the regular tasks of daily life. To thrive in today’s world, individuals need to be competent at finding and assessing information, and to use computer technologies effectively. Print literacy has always been a central goal for libraries – but over the next four years we will work with partners to broaden this goal by being a leader in supporting 21<sup>st</sup> century literacies including digital and financial literacies.

### Strategic Objectives for 2012 – 2015:

1. Inspire children and teens to read, and to discover the Library’s range of resources, through innovative programs, services and collections;
2. Develop targeted services, collections and outreach strategies to meet priority community needs, based on a deeper understanding of our communities, our aging and increasingly diverse customers, and the needs of marginalized populations;
3. Be a leader in supporting the development of 21<sup>st</sup> century literacies, including digital, civic, and financial literacies, through extended partnerships and programs;

4. Enable customers to easily explore and discover the best resources in both virtual and in-branch collections; and
5. Expand availability of e-books, e-materials and e-services.

## B. PLACES and SPACES that are Vital and Welcoming Community Hubs

### Background:

There is a “buzz” in our 33 branches. Children, teens, young adults, newcomers, seniors, entrepreneurs and others come to our branches to read, study, learn new skills, use the Internet, meet others and access a variety of programs and services. Our places and spaces are hubs in the many communities that make up Ottawa’s vast geographic area of 2,760 square kilometres.

Over the past four years we have made extensive upgrades to our facilities, including: major renovations at nine branches; construction of the Greely Branch; creation of four new Teen Zones and upgrades to 16 others; and improvements to the Main Library by upgrading the Ottawa Room (home to extensive local history collections) and creating better space for newcomer services. We recently opened a new facility that we share with the City—City of Ottawa Central Archives and OPL Materials Distribution Centre. We also opened the first experimental Library kiosk, a materials “vending” machine, in Canada.

As we look ahead, we are mindful of the need to maintain and renew our aging branches, and to respond to the needs of our growing communities, all within an environment of fiscal constraint. Libraries across North America are designing flexible places and spaces that can be more easily adapted to meet changing needs, use technology to maximize the quality and cost-effectiveness of library services, and increase efficiency and sustainability through environmentally sound design (SOLS, 2011). We also realize that our online “space” has significant potential to allow people to share insights and information and build an online community.

### Strategic Objectives:

1. Develop a master facilities strategy to inform library development priorities and to lay the foundation for 21<sup>st</sup> century library service. The strategy will guide the Library’s work in:
  - maintaining and renewing current facilities to support their role as vital, welcoming and safe community hubs, places to meet, study, connect and discover; and
  - building new places and spaces to serve as vital and welcoming community hubs that meet the growing and changing needs of Ottawa’s citizens;
2. Enhance the Library’s online community presence by incorporating flexible, robust technologies that optimize the customer’s virtual experience including social media; and
3. Demonstrate green leadership within the Library and act as a key partner in City sustainability initiatives.

## C. ENGAGEMENT of Customers, Communities, Partners, Employees and Volunteers

### Background:

We exist to serve the people of Ottawa. Our service is enhanced by engaging our customers and communities to ensure we meet their priority needs in the most effective manner. Research across North America demonstrates the importance of building awareness of the new roles libraries play – many people have an old-fashioned view of libraries as just repositories of books. As we develop new services, we are committed to working closely with user groups and communities to ensure we are focusing on what matters to them, and we are delivering services in the best possible way.

Partnership is a cornerstone of our approach to community engagement. Over the past four years, we leveraged public investment by working with new and long term partners including a broad range of community organizations and City departments. The Ottawa Public Library Foundation and the Friends of the Ottawa Public Library Association continue to be essential partners in our quest to expand and enhance services. The contribution of these organizations and other community volunteers is critical to our future.

We are working through a time of great transformation in the delivery of public library service. The next four years will see ongoing changes in how people access information. Our employees will continue to be called upon to assist users in navigating rapid changes in technology. The technical skills, creativity and leadership of our employees will be key to our ability to support effective service in the future.

### Strategic Objectives:

1. Implement new ways of effectively reaching out, engaging and communicating with customers and communities about services and future Library directions;
2. Develop and grow effective partnerships with community groups, service providers and other organizations;
3. Empower employees to provide service excellence by supporting further development of their technical and leadership skills; and
4. Engage and support volunteers from the Friends of the Ottawa Public Library Association, the Ottawa Public Library Foundation, and the community.

## D. INNOVATION through Technology and Continuous Improvement

### Background:

To meet changing needs in a time of fiscal constraint and technological transformation, we need to change, too. A fundamental technology shift is underway. A recent article highlights key trends including “delivery platforms are shifting”, “communication and collaboration channels are being reinvented”, the “consumer world of technology is driving innovation” and “data is opening up and exploding out of proliferating apps, devices and sensors”. (ZDNet, Dion Hinchcliffe, “The “Big Five” IT trends of the next half decade”, October 2011)

E-book readers, tablets and smartphones are becoming commonplace. The recent Market Probe survey suggested that the people of Ottawa are ahead of the curve (relative to Ontario as a whole) when it comes to Internet adoption and usage. Frequent Internet access is also associated with frequent access to the Library in person and, to a lesser extent, by phone. But for some citizens, the world of technology and the Internet is out of reach – either because they cannot afford access, or because they lack the basic skills to connect. As a primary agent of accessibility, we must continue to address the technology divide.

Over the next four years, we will continue to adapt our services and processes to: leverage new technologies; create the capacity to meet changing community needs; and increase convenience and quality for our customers. A culture of innovation will be a critical underpinning to our future.

### Strategic Objectives:

1. Deliver a digital strategy that narrows the technology divide (e.g. between experienced and novice users, and between those with access to technology and those without);
2. Maximize efficiencies and streamline services through continuous improvement and implementation of new technologies including Radio Frequency Identification (RFID);
3. Leverage technology to enhance services (technology is a key enabler of many of our strategic objectives.); and
4. Foster a culture of innovation and adaptation to new and emerging technologies.

## E. EXCELLENCE in Governance, Accountability and Financial Sustainability

### Background:

As a public institution, we are mindful of the need to sustain the public's trust by ensuring good governance, accountability and financial sustainability. Over the past four years, the Ottawa Public Library Board instituted a number of initiatives to build excellence in these areas, such as enhancements to the Library's performance measurement framework and improved reporting to the taxpayers and the public.

One of the City's strategic priorities for the 2011-2014 term of Council is *"to achieve a measurable improvement with residents in their level of trust with how the city is governed and managed, embed a sustainability lens to decision making, and create a governance model that compares favourably to best-in-class cities globally."*

Another central City priority is *"to be financially responsible to the residents of Ottawa by practising prudent fiscal management of existing resources."* We look forward to working with our City partners and other organizations to support the realization of these priorities to ensure excellence and fiscal accountability in governance, planning and decision-making.

### Strategic Objectives:

1. Ensure Library structures and practices support excellence in governance and effective accountability;
2. Strengthen performance evaluation, measurement and reporting systems including the development of a new strategic, balanced scorecard program;
3. Maintain strong links and leverage partnerships with the City of Ottawa to ensure effective and seamless service for our citizens; and
4. Work with the Ottawa Public Library Foundation, the Friends of the Ottawa Public Library Association, the City and others to ensure financial sustainability.

## 5. Approach to Implementation & Monitoring

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Once refined and approved, Ottawa Public Library's strategic directions will come to life through work with our partners, our ongoing planning and budgeting processes, as well as our ongoing capital development. We will monitor the changing environment annually and adjust our directions as necessary. Each year we will prepare a strategic work program and associated budget that shows how we will move forward to implement these directions.

The Library will measure progress and make quarterly reports on key indicators. As noted earlier, we will design a new strategic, balanced scorecard program to build on our previous work in performance measurement. We are committed to reporting to the community on an annual basis.

We will continue to participate in provincial and national benchmarking initiatives including the annual Canadian Urban Libraries Council survey, the Annual Provincial Survey of Public Libraries conducted by the Ontario Ministry of Culture, the Ontario Municipal Benchmarking Initiative, and the Public Library Data Service (a major survey of North American Libraries conducted by the American Library Association).

Finally, we will continue to listen to our customers through informal encounters and formal engagement processes. We welcome this ongoing input as we transform aspirations into action.

## 6. The Last Word: Perspectives from our Customers

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One of the inputs to our strategic plan renewal process was seeking feedback from our customers via an online survey. Here are some of the things they told us they value about the Ottawa Public Library

*I value being able to look for and reserve books online and have them put on hold for me when they are available. I am moderately housebound so this provides an invaluable service for me.*

*I value being able to obtain books that I cannot afford to buy, or which I don't have a need to keep.*

*Generally I find the library rather small and the collection is limited.*

*I value the reading corner; to take a book to a nice, comfortable spot, settle down and read in peace and quiet.*

*It would be great if there could be more e-books. There seems to be lots of audio books available electronically, but I want to read the book.*

*The friendliness, courtesy, helpfulness, and wealth of information that staff show and/or provide to all customers of the library.*

*I principally use the library for returns as they do not have a significant collection of the materials I need to access.*

*I also love the children's play area at the library. My kids have a great time there while deciding what books to take home.*

*Online services including the ability to access and download digital materials.*

*The wholeness of the library: friendly and efficient staff, on-line reservations and computer borrowing details, variety of items available, physical environment, variety of the public using the library at any given time, and the list goes on!*

*Wish you had more e-books.*

*As seniors, parents and grandparents, our whole family depends on the various elements offered by the library... The library provides a serious and invaluable source of contact with the world.*

*I just think that you should have more copies of the books.*

*An unsung hero of your library system (which I have only recently discovered thanks to a couple of seminars taken at your library) is the incredibly rich collection of databases available. For students, job hunters, small businesses or anyone interested in doing research this is an amazing resource.*

*Larger quantity of “bestseller” books and faster turnaround for books on hold.*

*The library is one of the most important community spaces in my life, and I hope that OPL can leverage its physical assets and digital connectivity even more in the years to come.*

*Good old traditional books.*