

# REPORT

## Oakville Public Library Board

**Meeting Date: September 18, 2024**

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**FROM:** Oakville Public Library

**DATE:** September 9, 2024

**SUBJECT: Q2 2024 OPL Goals Update – September 18, 2024**

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### **RECOMMENDATION:**

That the Q2 2024 OPL Goals Update be received for information.

### **KEY FACTS:**

The following are key points for consideration with respect to this report:

- As per the Oakville Public Library (OPL) Board Procedural By-Laws, the CEO is to set annual goals and expectations which are linked to the organization's strategic goals and recommend these to the Board for approval.
- For 2024, OPL proposed four areas of focus –Central Branch Development, Cardholder Growth, Customer Satisfaction, and Staff Growth and Engagement with corresponding goals for review and feedback.
- The 2024 OPL Goals were approved by the OPL Board at the January 18, 2024 meeting.
- Progress reports on the status of the OPL Goals are brought to the Board quarterly.

### **BACKGROUND:**

The CEO is required to submit annual goals to the Board for approval.

### **COMMENT/OPTIONS:**

For 2024, the following areas of focus were identified as key areas for improvement and/or growth in 2024:

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## **CENTRAL BRANCH DEVELOPMENT**

- 1. Starting in Q1 2024, OPL will begin planning for a new Central Branch located at 193 Church St. In 2024, the project will consist of public consultation on programs and services. The consultation process aims to receive feedback from over 2000 residents from across Oakville.**

***Strategic Pillar: Expanding Our Reach / Enriching Lives and Building Healthy Communities***

**Q1 Update:**

*The RFP was issued in March and received 13 submissions. OPL staff along with representatives from Facilities Services are in the process of reviewing and evaluating the submissions. The top submissions will then be required to participate in an interview phase. The successful firm is expected to be onboarded in June.*

**Q2 Update:**

*The architecture firm of Perkins&Will in partnership with Smoke Architecture have been retained by the Town of Oakville for the detailed design of the new Central project. In Q3, staff will be working closely with architect team to design a comprehensive community engagement plan to be rolled out in September.*

- 2. Starting in Q1 2024, OPL will launch a capital campaign to raise funds for the new Central Branch located at 193 Church St.**

***Strategic Pillar: Expanding Our Reach***

**Q1 Update:**

The Community Development and Engagement team is currently working on finalizing the fundraising campaign plan for the new Central Branch. The phase was delayed while OPL hired and onboarded a new Fund Development Coordinator. As part of the development of the plan, staff reviewed current fundraising policies and have brought forward updates to the Fund Development Policy for the OPL Board's review.

OPL will launch the campaign in June with a special event. More information to come.

**Q2 Update:**

The Community Development and Engagement brought a fundraising plan to the OPL Board in May for feedback. OPL has shifted its campaign kick-off event from June to September to correspond with the launch of the public engagement portion of the design project.

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## **LIBRARY CARDHOLDER GROWTH**

- 1. Starting in Q1, OPL will leverage its new marketing tool to develop cardholder onboarding and retention programs to highlight the depth and breadth of the tools and services available to customers with focus on digital. By the end of 2024, OPL will have increased its activity usage by 5%.**

**Strategic Pillar:** *Expanding our Reach / Promoting Digital Discovery*

### Q1 Update:

OPL has successfully completed the implementation and integration of the new e-mail marketing tool. This Customer Experience Platform (CEP) is linked directly to our Integrated Library System (ILS). This advancement allows OPL to safely use cardholder data to identify and understand customer behaviors, enabling the creation of targeted communications.

In Q1, OPL implemented the tool for newsletter communications. The upcoming quarter (Q2) will expand its use to specific onboarding strategies for different services like the book bike and in-branch new cardholders, as well as for summer reading registrations and New Central Branch capital campaign. These initiatives are designed to enhance engagement with cardholders.

### Q2 Update

Unfortunately, the Customer Experience Platform OPL purchased has proven not to have many of the promised features. After multiple months working with the vendor to resolve the issue, OPL has decided to move away from the Customer Experience Platform product. This was done without a financial impact other than the lost time working to resolve the issues.

OPL is now looking at other platforms to ensure the functionality needed to meet the goals. At this point, it is unlikely this goal will be achieved in 2024. This goal will move to 2025 based on the identification and implementation of a new product.

- 2. Starting in Q3, OPL will undertake a card sign-up initiative with the goal of increasing OPL's percentage of Oakville households with an OPL card by 2%.**

**Strategic Pillar:** *Expanding our Reach.*

### Q1 Update:

*Not started yet*

### Q2 Update:

At the start of 2024, 50% of Oakville households had at least 1 OPL card. As of the end of June 2024 that number has risen to 53%. This due in part to outreach activities which have seen OPL staff be present at a variety of festivals and events around Oakville in early spring. These activities enable staff to engage with residents and highlight to residents the various services OPL offers that would benefit them and/or their families.

Staff have actively been engaging with residents through a variety of touchpoints and encouraging card registration. These activities will continue through the remainder of the year, as such OPL will be aiming for 55% by the end of Q3.

### Customer Satisfaction

**In Q2 2024, OPL will introduce a customer satisfaction survey for Oakville residents to measure satisfaction of key library services and to monitor how customers use and feel about OPL. Metrics gathered will then be identify areas of improvement and/or growth and make adjustments/changes accordingly.**

**Strategic Pillar:** *Enriching Lives and Building Healthy Communities / Expanding our Reach.*

### Q1 Update:

OPL launched its customer satisfaction survey in March 2024. As of April 30, OPL has received 125 completed surveys. Overall, OPL is seeing high levels of satisfaction from our customers (no average responses below 80%), however, the following areas have been identified for review based on survey comments:

- Programming – Requests for more programming at different age groups (e.g. tweens and seniors)
- Collections – Requests for more selection in specific genres (e.g. British authors, biographies) and Library of Things (e.g. Puzzles).
- Open Hours – Requests for longer hours particularly on Sundays.

A detailed overview of survey results report will come to the board in the fall once OPL has accumulated 6 months of data.

*Q2 Update:*

Since launching in April 2024, OPL has received 179 survey responses. A report providing highlights from the first 6 months of survey results will come as part of the Q3 OPL Goals report.

**Staff Growth and Engagement**

**In Q2, begin launching distinct onboarding programs for the 3 core customer experience positions (Library Assistant, Customer Service Technician, Customer Information Specialist) involving thorough development and standardization of training content and delivery. All 3 onboarding programs will be launched by the end of Q4.**

**Strategic Pillar:** Investing in staff to deliver exceptional customer experiences.

Q1 Update:

No update.

Q2 Update

Significant progress was made in Q2, with a training matrix developed for the Customer Service Technician and Customer Information Specialist roles. This resulted in a comprehensive and standardized onboarding schedule. This schedule includes standardized timelines, content, and delivery formats, and is currently being tested in OPL's learning management system software for launch in early fall.

**DIVERSITY, EQUITY AND INCLUSION (DEI)**

**Starting in Q1, 2023, begin implementing Year 2 of OPL's Diversity, Equity and Inclusion Strategic Framework (Appendix A). Year 2 builds on the previous actions identified in 2023 and takes into account the Town of Oakville's proposed multi-year Inclusion, Diversity, Equity and Accessibility plan (Appendix B).**

***Strategic Pillar: Enriching Lives and Building Healthy Communities / Investing in Staff to deliver exceptional experiences.***

Quarterly Updates are provided in Diversity, Equity and Inclusion Strategic Framework (Appendix A).

**APPENDICES:**

Appendix A – Diversity, Equity and Inclusion Strategic Framework – Year Two

Prepared and submitted by: Tara Wong, CEO