

REPORT

Oakville Public Library Board

Meeting Date: February 20, 2025

FROM: Oakville Public Library

DATE: February 11, 2025

SUBJECT: Q4 2024 OPL Goals Update – February 20, 2025

RECOMMENDATION:

That the Q4 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 OPL 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:

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.

Q3 Update

The initial public engagement portion for the New Central Project ran from September into mid-October. A full summary of the public engagement can be found in Appendix A.

The Indigenous engagement portion for phase one of the project started in October and will run into mid-December.

Q4 Update

The Indigenous consultation sessions are complete including a summary report from Smoke Architects. The feedback gathered from both the public and indigenous consultations will be used to help shape the design of New Central. Initial concepts designs are expected to come to the board in Q2 2025 followed by another round of consultation to validate that the initial feedback was incorporated into the design as expected.

- 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.

Q3 Update

On September 27, OPL hosted a donor Open House to launch the capital campaign for the New Central Project. Donors were invited to Central after hours for a cocktail style reception to meet with architects from Perkins&Will and Smoke Architects along with OPL staff and Board members. Attendees were able to provide feedback on provided public engagement questions. The response was very positive with numerous attendees expressing interest in having further discussions as the design emerges. The event also resulted in donations directly following the reception.

Q4 Update

Following the public engagement events including the Donor Open House, OPL held conversations with individuals interested in learning about potential donor options available as part of the New Central project. OPL is nurturing these relationships while work on a design continues. Once a design concept is available, OPL will engage with interested parties to start to identify particular areas of interest and options for support.

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.

Q3 Update

As Above

Q4 Update

OPL has completed the RFP process for a new marketing tool which is expected to launch in Q1 2025.

- 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.

Q3 Update:

As of September 30, 2024, 55% households in Oakville have at least one library card. OPL has adjusted its goal and will aim for 57% by the end of 2024.

Q4 Update

As of December 31, 2024, the town of Oakville had 43,030 households with 1 or more OPL cards. This brought OPL's percentage of Oakville households to 56%. This is 1% less than our stretch goal of 57% but overall OPL saw a 6% increase in household from start of 2024 which equates to an additional 4,130 households signed up and using OPL services.

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.

Q3 Update

Due to capacity pressures in Q3, the report providing highlights from first 9 months of survey results will come to the board as part of the Q4 OPL Goal report in January.

Q4 Update

Since the customer satisfaction survey launched in April and as of December 31, 2024, OPL has received 261 survey responses. The Customer Satisfaction 2024 Survey Result report in this board package provides a high level review of the data and actionable steps OPL is taking to address the feedback.

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.

Q3 Update

The new standardized onboarding training program is in practice, as of this month, for the Customer Information Specialist and Customer Service Technician positions. The learning management system software is being configured for the future development of asynchronous training modules, and the training matrix for the Library Assistant position is being finalized.

Q4 Update

As of Q4 2024, the standardized onboarding training programs have been successfully launched for all Customer Experience branch positions, including Customer Information Specialist (CIS), Customer Service Technician (CST), and Library Assistant (LA) roles. This marks the successful completion of the project in alignment with the promised goal.

Additionally, the learning management system (LMS) is actively being updated with asynchronous training modules as new content is developed and existing materials are refined. This ongoing effort will enhance operational efficiencies and ensure that training content remains current and relevant to evolving library needs. Moving forward, OPL will continue to monitor and optimize the onboarding experience to support staff development and maintain consistency across all branches.

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