



Oxford County Library

Facility Planning Study

Final Report

November 2007

Prepared by:

dmA Planning & Management Services

3044 Bloor Street West, Suite 315
Toronto, Ontario M8X 2Y8
(p) 905.275.4458 • (f) 905.275.7148
(e) jmorgenstern@dmaconsulting.com
(w) www.dmaconsulting.com

November 2, 2007

Ms. Lisa Miettinen
CEO/Chief Librarian
Oxford County Library
130 Oxford St
Ingersoll, Ontario
N5C 2V5

Dear Ms. Miettinen:

We are pleased to provide our final report concerning the Oxford County Library Facility Planning Study. This study provides a long-term strategy for the future development of library facilities in Oxford County. The strategy is based on the changing role of libraries and the specific needs of your community. Our recommendations were developed with considerable input from current library users, Oxford County Library staff and members of the Board. We trust the report will provide a solid basis for future decisions concerning library facilities.

It has been a pleasure working with you, other Oxford County Library staff and the Board on this project.

Thank you for the opportunity to be a part of this study.

Sincerely



Jim Morgenstern MES, RPP
Principal
dmA Planning & Management Services

Table of Contents

Summary of Recommendations	1
Chapter One: Introduction	3
1.1 Purpose of the Study	3
1.2 Study Process	3
Chapter Two: A Preferred Facility Model And Future Facility Requirements	5
2.1 Introduction	5
2.2 Overall Library Space Requirements	5
2.3 A Library Facility Hierarchy for Oxford County	7
2.4 The Future Facility Development Strategy	11
2.4.1 Facility Based Design, Space and Service Limitations	12
2.4.2 Population Growth and Future Facility Requirements	14
2.4.3 Total Number of Library Branches in the OCL System	16
Chapter Three: Operational and Management Issues	18
3.1. Introduction	18
3.2 Policies in Support of the Recommended Facility Model	18
3.2.1 Facility Funding Responsibilities	18
3.2.2 Capital Contributions for Small Library Improvements	19
3.2.3 Small Library Policy	20
3.3 Service Improvements	21
3.3.1 Marketing and Promotion	21
3.3.2 Expanded Programming	22
3.3.3 Hours of Operation	23
3.4 Future Planning	24
3.4.1 A Strategic Plan and Business Plan for OCL	24
3.4.2 Planning and Evaluation of Library Services	25
Chapter Four: Implementation	26
4.1 Introduction	26

SUMMARY OF RECOMMENDATIONS

- Recommendation 1:** The OCL should adopt 0.6 gross sq. ft. per capita as a planning guideline for library space requirements.
- Recommendation 2:** The current allocation of library space is adequately meeting the needs of the community. Current population projections indicate a short-fall of library space by 2021, and this should be monitored and plans for new branches developed to respond to future needs as warranted.
- Recommendation 3:** The OCL should adopt a three-tier library hierarchy that includes large, medium and small branches. Each branch in the hierarchy will be defined by facility and service characteristics and these should be used as a guide when planning future facilities.
- Recommendation 4:** With the exceptions noted below, the OCL branches do not fully conform to current trends and best practices for facility design, and consequently may not fully meet the needs of future users, but they can provide an adequate level of service and facility redevelopment or renovation is not warranted. However, opportunities should be pursued if available to restructure internal space or make use of shared space to address the limitations of these libraries.
- Recommendation 5:** The Tavistock branch is deficient in most respects and should be replaced with a fully functional library branch.
- Recommendation 6:** The Brownsville, Otterville and Embro branches should be replaced if an opportunity arises to establish a more functional branch library. Replacements for these branches, if pursued, should be consistent with the small branch guidelines recommended in this report.
- Recommendation 7:** A new branch of about 5,000 sq feet should be provided library as soon as possible to replace the existing Tavistock library.
- Recommendation 8:** No further expansion of library space is recommended to meet the needs of population growth at this time. Use of existing facilities and indicators of unmet demand should be monitored, especially in the south west area of the County, and addressed as warranted.
- Recommendation 9:** While an increase in the number of OCL library branches is not indicated, all existing branches should be retained.
- Recommendation 10:** The OCL should adopt a consistent approach for the future funding of library facility costs. While options should be explored, consideration should be given to the County funding large and medium branches with the local municipality funding all facility costs associated with small branches.
- Recommendation 11:** Additional funds should be committed to facility upgrades and improvements for the small libraries.

- Recommendation 12:** OCL should establish a reserve fund to finance improvements and upgrades that will be required to meet standards established by senior levels of government and to address capital conservation needs. An allocation of \$20,000 annually is recommended until actual costs are confirmed.
- Recommendation 13:** Local municipalities should be encouraged to establish reserves to fund their share of future facility costs.
- Recommendation 14:** The OCL Board should prepare a Small Library Policy that clarifies the role of these libraries, appropriate service standards, minimum facility requirements, and minimum performance standards.
- Recommendation 15:** Improved marketing and promotion is required for OCL services. Marketing should be assigned to a new staff position with shared responsibility for programming and marketing.
- Recommendation 16:** Improved signage is required for the OCL branches. Consistent signage should be prepared for all branches.
- Recommendation 17:** The OCL should explore opportunities to expand programming at all branches, but most importantly at the small branches to create a stronger connection to the local community. Program development should be assigned to a new staff position with shared responsibility for programming and marketing.
- Recommendation 18:** The OCL should review hours of operation at all branches, adopt formal criteria for setting hours that reflect demand and use, and make adjustments to current hours of operation, as warranted.
- Recommendation 19:** The OCL should monitor demands for Sunday service and respond in the future, if warranted based on community demand.
- Recommendation 20:** The OCL should implement the recommendations of the 2006 Operational Review with respect to improved planning processes.
- Recommendation 21:** The OCL should implement an ongoing process for planning and evaluating library services that incorporate the recommended facility and service guidelines; selected performance measures, and periodic surveys of users.

CHAPTER ONE: INTRODUCTION

1.1 Purpose of the Study

The primary purpose of the study was to develop a plan that will address library facility requirements in Oxford County. The Oxford County Library (OCL) has not prepared a long range facility plan to guide the development of library branches. Such a plan is required to address population growth; questions concerning the future status and role of some of the branches and changing demands and expectations among users, and emerging design and facility development trends. This report makes a number of recommendations that will assist the Library Board and senior staff to plan for future facilities, while ensuring continued provision of quality library services to Oxford County residents.

The scope of this study was primarily focused on library facilities. It did not involve a detailed review of existing services, programs or staffing and organizational issues.¹ While the focus is current and future library facilities, we have made a number of observations and recommendations concerning the operation and management of library services. These address issues associated with future facility provision and were identified in the course of the study. We have organized the report in two major parts. Chapter Two addressed future facility requirements and a preferred facility model. Chapter Three discussed the operational and management issues. The final chapter in the report provides guidance on the implementation of the recommendations.

Much of the information supporting our analysis is documented in a separate background report - the Planning Context Report (August 2007). While selected findings from the Planning Context Report have been included in the draft Final Report, the reader is referred to the background report for details. The conclusions and recommendations in this report are closely tied to the information in the Planning Context Report.

1.2 Study Process

The study involved four phases, as described below:

Phase One: The Planning Context for Library Services

The planning context phase included a review of relevant background information on the Library's branches; a review of planning reports documenting population, demographic, social and economic characteristics; a review of information on the history of library service delivery in the County, including all related documentation from the Library Board. Trends and best practices affecting libraries in Ontario were reviewed and those most relevant to Oxford County were identified. Each branch library was also visited to develop a service profile, describe the current state of service delivery and identify any space and functional deficiencies. A review of guidelines and

¹ The Oxford County Library prepared an Operational Review in 2006 that investigated a number of issues associated with operating costs; organizational structure and the role of the Board. This was followed with additional work concerning Board policies and governance. The Library has not, however, prepared a strategic plan or conducted an in-depth assessment of services.

standards for rural/urban libraries was conducted, and Oxford County libraries were compared to relevant standards and guidelines. The Phase One information is documented in the Planning Context Report.

Phase Two: Consultation and Issue Identification

Library users and key stakeholders were involved in the study as follows:

- Key informant interviews (Library Board members, key municipal staff, senior library staff, and other stakeholders) to gain an understanding of the issues, constraints and opportunities relevant to this study;
- Discussions with library staff to document perceptions of facility needs, priority groups, service gaps, etc.;
- A survey of library patrons to collect factual data required for the analysis and not available from other sources (e.g., how far users travel to visit the library; whether trips to the library are done in conjunction with shopping, recreation activities; barriers to use including inaccessibility, hours of operation; perceptions and expectations, including measures of current satisfaction and desired service improvements).

The results of these activities are summarized in the Planning Context Report.

Phase Three: Development of a Preferred Service Delivery Model

Based on the research and consultation activities conducted in previous phases, the consultants prepared a discussion paper highlighting key issues and considerations surrounding a future service delivery model for OCL. A workshop was held with Board members and senior library staff and input used to develop recommendations.

Phase Four: Final Report and Implementation Plan

In Phase Four, a draft report and implementation plan was prepared and reviewed with the Board and the general public prior to the submission of the Final Report.

CHAPTER TWO: A PREFERRED FACILITY MODEL AND FUTURE FACILITY REQUIREMENTS

2.1 Introduction

Future library facility requirements are discussed in this chapter. The following are the major topics addressed:

- Overall Library Space Requirements
- The Facility Hierarchy
- A Facility Development Strategy

2.2 Overall Library Space Requirements

The OCL's thirteen libraries provide 32,743 sq. ft. of space. In addition, approximately 4,000 sq. ft. are available at the Library's central administration office.

Applying the Ontario Public Library Guideline of 0.6 sq. ft. of public library space per capita², the 2006 population of 52,454³ for the Towns and Townships served by the County equates to a requirement of approximately 31,472 sq. ft. of library space. Assuming the population of the County grows as projected, Table 2.2.1 shows the resulting library space requirement by 2021 and 2031.

By 2021, more than 38,700 sq. ft. of library space will be required if the OPL guidelines are applied and assuming population grows as projected. By 2031, more than 41,500 sq. ft. of library space will be required.

² The OPL guidelines are widely accepted as a basis for future space planning. For a further discussion, see the Planning Context report.

³ See Table 2.1 for Statistics Canada 2006 population for individual Towns and Townships served by the County Library System.

Table 2.2.1: Library Space Needs Based on Population Growth

	County Population	Space Projection at 0.6 sq. ft./capita (OPL)
2006*	52,454	31,472
2021	64,600	38,760
2031	69,300	41,580

*Statistics Canada 2006. Includes only the Towns and Townships served by the Oxford County Library.

Table 2.2.2 projects future library space requirements for the municipalities served by the OCL, based on population projections provided by Hemson Consulting (2006). Assuming the municipalities grow as projected, about 6,000 additional square feet of library space will be required by 2021. It is important to note that although the population projections applied are the most recent available, there is always uncertainty concerning the accuracy of these projections. It has been suggested that these projections may be optimistic, and consequently facility recommendations should be reviewed regularly as population data is updated.

Table 2.2.2: Library Space Projections by Municipality

Municipality	Current Library Space SF (2006)	Population 2006	Deficit/ Surplus for 2006 (@ 0.6 SF/ capita)	Projected Population 2021*	Space Needs by 2021 (@ 0.6 SF/ capita)	Deficit /Surplus by 2021 (@ 0.6 SF/ capita)
Township of Blandford- Blenheim	4,100	7,149	-189	9,000	5,400	-1,300
Township of East Zorra- Tavistock	2,452	7,350	-1,958	8,500	5,100	-2,648
Town of Ingersoll	12,160	11,760	5,104	15,300	9,180	2,980
Township of Norwich	7,285	10,484	995	12,700	7,620	-335
Township of South-West Oxford	1,046	7,589	-3,507	8,700	5,220	-4,174
Township of Zorra	5,700	8,125	825	10,300	6,180	-480
Total	32,743	52,457	1,269	64,500	38,700	-5,957
Library Admin. Space	4,000					
Total with Admin Space	36,743					

Hemson Consulting. 2006. *Population, Household and Employment Forecasts 2001-2031*. Report prepared for Oxford County, April 2006.

These figures demonstrate a requirement for about 6,000 sq. ft of additional library space by 2021 and indicate a possible need to expand library space in East Zorra Tavistock and South West Oxford. Notwithstanding these requirements, the OCL system as a whole would appear to be well supplied with library space through 2021 – the planning period for this study. Additional library space, therefore, is not a significant issue.

Two considerations affecting the identified space requirements should be noted. Oxford County residents have access to public libraries in Woodstock and Tillsonburg, which are not reflected in these projections. However, residents from these communities also use the OCL system, and while no data is available, it is assumed that reciprocal use is roughly balanced and does not affect overall space requirements.

It should also be noted that the library space deficiencies are calculated based on the populations of the six municipalities. Library facility service areas will not always conform to municipal boundaries (e.g., residents may more often use a library outside of their municipality of residence). With available information, we have no accurate way to determine library service areas. Based on discussions with the Library Board and staff, it appears that requirements in South West Oxford may be over-stated due to a greater reliance on libraries in Ingersoll and Tillsonburg.

Recommendation 1: The OCL should adopt 0.6 gross sq. ft. per capita as a planning guideline for library space requirements.

Recommendation 2: The current allocation of library space is adequately meeting the needs of the community. Current population projections indicate a short-fall of library space by 2021, and this should be monitored and plans for new branches developed to respond to future needs as warranted.

2.3 A Library Facility Hierarchy for Oxford County

Table 2.3.1 below consolidates the ARUPLO guidelines for rural/urban libraries of different sizes, and compares these with the library services provided by OCL branches. For the purposes of this assessment, the thirteen library branches were grouped on the basis of size⁴. While this is the most appropriate indicator for classifying the libraries, Oxford County libraries do not always easily fit into the ARUPLO categories on all indicators. Data shown in the Oxford County columns represent the average for branches in each grouping.

⁴ Information on individual libraries is outlined in the Planning Context report.

Table 2.3.1: ARUPLO's Guidelines Compared to Oxford County Libraries

	ARUPLO				OXFORD COUNTY			
	Large Branch	Medium Branch	Small Branch	Deposit Station	Large (Ingersoll)	Medium* (3 libraries)	Small** (5 libraries)	Deposit*** Stations
Population Served	10-35,000	5-10,000	1-5,000	<1,000	11,760	N/A	N/A	N/A
Size(sq. ft. min.)	7-21,000	3-7,000	2.5-3,500	1-2,500	12,160	4,000	1,167	687
Minimum Collection (Volumes)	30,000	20,000	10,000	7,500	58,186	12,639	8,673	5,234
Print Periodicals (Min.) ⁵	80-100	40-50	10	-	60	28	15	12
Annual Circulation (Items) ⁶	80-280,000	40-80,000	8-40,000	8,000	123,725	29,326	14,197	13,413
Weekly Hours of Operation (Min.)	35-60	25-35	20-25	12	60	32	17	14
Public Access Computers ⁷	6-12	3-6	3	-	10	7	2.4	2
Seating (Users) ⁸	50-175	25-50	25	5	91	27	16	11
Staffing (FTEs)	5-17.5	2.5-5	1-2.5	1	7.8	1.8	.8	.7

*Represent the average of medium branches: Plattsville, Norwich, Thamesford

**Represent the average of small branches (1,000 - 3,000 sq.ft.): Princeton, Innerkip, Tavistock, Otterville, Harrington

***Represents the average of smallest branches (< 1,000 sq.ft.): Burgessville, Brownsville, Mount Elgin, Embro

As shown above, the Ingersoll Branch is compared to a large branch in terms of population served and size based on the ARUPLO guidelines. This branch exceeds the minimum annual circulation, collection requirements, and falls within the range for weekly hours of operation, public access computers, seating and staffing compared to ARUPLO guidelines for large branches. The number of print periodicals falls below the guidelines for large branches.

OCL branches between 3,000 and 7,000 sq. ft. are considered medium branches for the purposes of this comparison. These branches are at the lower end of the range in terms of size, meet the guidelines for weekly hours of operation, exceed the guidelines for public access computers, but fall below the range for minimum collection size, print periodicals, annual circulation, seating and staffing.

For the purposes of this comparison, we have assumed that existing OCL branches between 1,000 and 3,000 sq. ft operate as small branches, even though ARUPLO does not recommend building a stand-alone branch smaller than 2,500 sq. ft. As shown above, these libraries are more comparable to AURPLO's deposit stations than small

⁵ ARUPLO Guidelines note that print periodicals may be adjusted according the number of electronic periodicals provided. Minimum of 2,500 electronic periodical titles should be available.

⁶ ARUPLO Guidelines state minimum 8,000 circulations per year for a rural/urban branch. OPL guidelines suggest 8 circulations per capita. Both are applied here.

⁷ ARUPLO Guidelines state a minimum of 3 public access workstations, and branches serving over 2,500 should have 1 additional workstation per 1,300 pop. Computer Internet workstations should be high speed.

⁸ ARUPLO Guidelines state 5 user spaces per 1,000 capita.

branches, since in all categories except for number of print periodicals, they fall well below the guidelines for small branches.

OCL's very small branches (<1,000 sq. ft.) are compared to ARUPLO's deposit station guidelines in the table above. Annual circulation, number of print periodicals, weekly hours of operation, and computer resources exceed the deposit station guidelines. These very small branches fall below the guidelines for minimum collection size, seating and staffing.

This study is to recommend a future library facility hierarchy for Oxford County. This involves identifying different sizes of libraries, with different service characteristics (e.g. hours of operation, collection size, computer workstations, etc.) that play different functions in the overall library system. Library facility hierarchies are customary planning tools. They define the OCL's perspective on the role and function of various branches and can serve both as general performance measures and as constraints to facility development. If OCL adopts the recommended facility hierarchy, it will attempt to realize the service guidelines (e.g. attempt to achieve circulation and use targets, etc.) but will also only support a specified level of service (e.g. a small library will not be open more than 15 hours a week and will be considered an appropriate size if it is about 1,000 sq. ft.). The guidelines will be used by staff and the Board to guide planning and decision-making. There have been cases recently where local municipalities have made inquiries about replacing facilities which would include the library (e.g. the Brownsville community centre and branch library). The guidelines, if adopted by the Board, provide a basis for answering these questions. In addition, because they set reasonable minimum standards of service where characteristics such as the size of the library are related to collection and anticipated use, this will ensure that plans for future facilities are appropriate. If these guidelines were in place when the Princeton branch was planned, for example, it would have been a larger facility. Finally, the guidelines provide rationales for rejecting small adjustments to service that are not warranted based on the use of the library. For example, if a community requests increased hours of operation or proposes a small addition to an existing branch, and these proposals are not warranted based on the other characteristics that define the role of the branch in question, they would be rejected. Consequently, a facility hierarchy is a useful and important planning tool.

It must be emphasized however, the hierarchy is intended as a guide for decision-making. There may be occasions where the specific circumstances surrounding a particular branch will suggest a departure from these guidelines. Furthermore, in situations where current branches do not meet the guidelines, it is understood that it may not be practical to make changes. For example, OCL has a number of branches that are smaller than 1,000 sq. ft. minimum proposed here for small branches. It clearly would not be practical or cost-effective to add a few hundred square feet to an existing library simply to meet this guideline. However, if an opportunity arises to replace or renovate an existing facility, the guidelines can be used to establish revised planning targets.

As noted above, with the exception of Ingersoll, OCL's current branches do readily correspond to the ARUPLO guidelines. We have, therefore, proposed adapting these guidelines to OCL's current situation as follows.

Ingersoll is the only large library and it should continue to play this function in the future. As noted, Ingersoll, unlike most other OCL libraries generally conforms to the ARUPLO guidelines and we have recommended these be

retained for future planning purposes. The ARUPLO guidelines have been adapted to relate to the Ingersoll branch in Table 2.3.2.

Although Thamesford and Plattsville underperforms on some measures, these branches and Norwich are clearly the second tier of the hierarchy in the current system. We would argue that a redeveloped and expanded Tavistock branch should be placed in this second tier. (As discussed further below, if the projected space deficiency in East Zorra Tavistock was corrected a branch of 5,000 sq. ft. branch would be provided in Tavistock, which would be comparable to the facilities in Thamesford, Plattsville and Norwich). This second tier of library branches would be classified as “medium” libraries; however, they are actually small, medium libraries by ARUPLO standards. We have therefore adjusted the ARUPLO guidelines to create an OCL medium library classification.

To complete the hierarchy, we need to determine if OCL’s library hierarchy should include both small libraries and deposit stations (as noted in Table 2.3.1). OCL should be guided by the current situation where the smallest libraries generally straddle the small library/deposit station classification but are much more likely to conform to the deposit station classification, or essentially function as “small” small libraries. While some of the smallest libraries have characteristics of a deposit station (particularly the size) they function in a manner that is similar to the small branches. Consequently, there is no purpose in adopting separate classifications for small branches and for deposit stations. We would suggest that a single small library classification be adopted and that it blend the characteristics of a small library and a deposit station as noted below.

Table 2.3.2: ARUPLO's Guidelines Compared to Oxford County Libraries

	ARUPLO Guidelines				OCL Guidelines		
	Large Branch	Medium Branch	Small Branch	Deposit Station	Large (Ingersoll)	Medium (Plattsville, Norwich, Thamesford, Tavistock)	Small (Princeton, Innerkip, Otterville, Harrington, Embro, Burgessville, Brownsville, Mount Elgin,
Population Served	10-35,000	5-10,000	1-5,000	<1,000	15-20,000	4-7,500	1,000-3,000
Size (sq. ft. min.)	7-21,000	3-7,000	2.5-3,500	1-2,500	10-15,000	4-5,000	1,000 minimum
Minimum Collection (Volumes)	30,000	20,000	10,000	7,500	50,000	12-15,000	5-7,000
Print Periodicals (Min.)	80-100	40-50	10	-	60-80	30-40	No guideline
Annual Circulation (Items)	80-280,000	40-80,000	8-40,000	8,000	120-160,000	30-60,000	8-15,000
Weekly Hours of Operation (Min.)	35-60	25-35	20-25	12	55-60	25 minimum	15 maximum
Program Space	Not Stated	Not Stated	Not Stated	Not Stated	1-2,000 sq. ft.	300-500 sq. ft.	Not provided
Public Access Computers ⁹	6-12	3-6	3	-	10-15	7-10	3 minimum
Seating (Users) ¹⁰	50-175	25-50	25	5	50-75	15-20	15 minimum
Staffing (FTEs)	5-17.5	2.5-5	1-2.5	1	5-10	1.5-2.5	1.0-1.5

Recommendation 3: The OCL should adopt a three-tier library hierarchy that includes large, medium and small branches. Each branch in the hierarchy will be defined by facility and service characteristics and these should be used as a guide when planning future facilities.

2.4 The Future Facility Development Strategy

The future facility development strategy for the OCL has three major components.

- Correcting the facility based design, space and service limitations of existing libraries.
- Responding to the needs of future population growth.
- Confirming the total number of library branches to be included in the OCL system.

⁹ ARUPLO Guidelines state a minimum of 3 public access workstations, and branches serving over 2,500 should have 1 additional workstation per 1,300 pop. Computer Internet workstations should be high speed.

¹⁰ ARUPLO Guidelines state 5 user spaces per 1,000 capita.

2.4.1 Facility Based Design, Space and Service Limitations

Library branches were visited and their design features evaluated with respect to current trends and best practices.¹¹ It should be acknowledged that some of the roles and functions for the “library of the future”, as outlined in the trends discussed in the Planning Context Report, may be difficult to achieve and may not be applicable in a largely rural system. Customer service technologies (such as self check out) will not be financially feasible in most of OCL’s libraries. Creating a strong connection to the street, maximizing visibility, and acting as a focus for the community is perhaps a role that libraries large or small could play, but it is a role most often associated with larger libraries and larger centres. Ingersoll can play this role to some extent. Other libraries, such as Princeton, Thamesford and Plattsville may function as a community focus due to co-location with other community facilities (museum, community hall and school). In other situations, the role will be minimized by the location of the library (e.g. Innerkip and to a lesser extent Norwich). Consequently, while design and building trends are strongly rooted in changing roles and functions of libraries, there will be constraint unique to the rural nature of the OCL system and a realistic approach to meeting these needs, particularly among existing branches is necessary.

The only library that largely conforms to the trends and best practices is Norwich. This is understandable given that this is the County’s newest and most modern branch. The County’s other larger libraries – Plattsville, Thamesford, and Ingersoll – are also generally consistent with these trends – however, in all cases, if the libraries were being built today, additional space and design detail would be committed to specialized functions such as reading and working areas, user amenities (e.g. food services), and dedicated programming and use areas (e.g. larger, better equipped program rooms, segregated space for youth, etc.). Some attempts have been made and are being considered to address emerging needs within the confines of the existing facilities (e.g. attempts to accommodate a food service area, reading lounge and a youth reading/program area at the Ingersoll branch). These efforts are encouraged and any practical opportunities to make these adjustments should be pursued. However, these libraries can continue to meet the needs of users for the foreseeable future and it is neither practical nor necessary to make major changes to be more consistent with trends and best practices.

Among the large and medium branches (as defined in Section 2.3 above) only the Tavistock branch is so at odds with contemporary design standards as to warrant immediate replacement. This library is deficient in most respects and should be replaced with a new facility. This is discussed further in section 2.4.2 as the key recommendation in the library facility development strategy.

The small OCL branches are generally not consistent with design trends and best practices. However, in a number of cases it would be very difficult to meet these objectives because of the limited size of the facilities. If small libraries are to continue to be a feature of the OCL system, they will never fully correspond to these trends. Library patrons are increasingly making use of services housed in the library – reading and working stations; computer terminals; program rooms; specialized collections or functional areas; etc. These cannot be accommodated in 1,000 sq. ft buildings. Notwithstanding the size limitations, a number of OCL’s small libraries are well designed and provide appropriate services for the space available. This is the case for Innerkip, Harrington, Princeton, Mount

¹¹ See the Planning Context Report for a discussion of trends and a more in-depth review of their implications for the OCL branches.

Elgin and Burgessville. Based on the site inspections conducted for this study, these branches primarily suffer from space constraints and it is not apparent that anything could be done to correct these limitations. With the exception of ongoing minor improvements (painting, internal furnishings, carpet, etc), these libraries can be retained in their current state for the foreseeable future and they will meet the community's needs. It should be noted, however, that Harrington and Burgessville will not meet requirements for full accessibility and if current legislation is retained, changes will be required in the future. We have recommended elsewhere that capital reserves be established for this purpose.

The other small libraries (Brownsville, Otterville and Embro) are not only too small; they do not meet contemporary standards for public buildings (full accessibility; adequate public washrooms, reasonable lighting levels and adequate air circulation, heating, noise suppression, etc.). These limitations have little to do with the building functioning as a library – they simply point to limitations associated with the age and condition of the building. These libraries also generally lack aesthetic appeal with outdated interior finishes, furniture and user amenities.

The Brownsville, Otterville and Embro branches are not consistent with contemporary building standards for municipal buildings and do not function well as libraries. However, levels of use are consistent with or exceed those of other small libraries. These branches are meeting needs in the community and the survey of users at these branches does not indicate dissatisfaction. There is, therefore, no immediate urgency associated with the facility upgrades. If future use continues to justify the retention of these small branches, they should be replaced and/or renovated to meet the guidelines for small libraries discussed previously and to correct the deficiencies noted. We understand that in all cases there has been discussion of relocating the library to another public building. If these opportunities arise, they should be pursued by the OCL.

Recommendation 4: With the exceptions noted below, the OCL branches do not fully conform to current trends and best practices for facility design, and consequently may not fully meet the needs of future users, but they can provide an adequate level of service and facility redevelopment or renovation is not warranted. However, opportunities should be pursued if available to restructure internal space or make use of shared space to address the limitations of these libraries.

Recommendation 5: The Tavistock branch is deficient in most respects and should be replaced with a fully functional library branch.

Recommendation 6: The Brownsville, Otterville and Embro branches should be replaced if an opportunity arises to establish a more functional branch library. Replacements for these branches, if pursued, should be consistent with the small branch guidelines recommended in this report.

2.4.2 Population Growth and Future Facility Requirements

As noted above, we have recommended that the Tavistock branch be replaced due to serious functional limitations. In addition, as noted in Section 2.2 of the report, due to a current deficiency aggravated by population growth, East Zorra Tavistock will require a sizeable expansion of library space by 2021. Approximately 5,100 sq. ft. of library space is indicated based on the recommended planning guideline. To meet current and future needs in this area, a new contemporary branch, consistent with trends and the anticipated needs of future users, should be developed. While additional planning and design studies are required to confirm requirements, a branch of about 5,000 sq. ft. is recommended. The following is a general description of a possible space program for a 5,000 sq. ft. branch in Tavistock.

Table 2.4.1: Possible Space Programs – New Tavistock Library
(net sq. ft)

Components	(net sq. ft)
- Lobby, Reception ¹²	150
- Circulation & Customer Information ¹³	200
- Administration & Staff ¹⁴	200
- Collections ¹⁵	2,450
- Reading/Working ¹⁶	500
- Program/Assembly ¹⁷	300
- Other Public Library Space ¹⁸	200
- Service Areas ¹⁹	200
Sub-total (net area)	4,200
TOTAL AREA (gross area)	5,000

Table 2.4.2 below presents a capital cost estimate for the proposed Tavistock library, including site development, contingencies, equipment and fitments, and consulting fees. This is a preliminary estimate generally consistent with recently tendered comparable projects. Actual costs will vary significantly depending on design, quality of materials and finishes, site conditions etc. Construction costs can vary significantly depending on design and the owner's specifications concerning building materials, finishes, etc. A base construction cost of \$200/sq. ft. was adopted.

¹² Includes social space and notice boards, public washrooms, etc.

¹³ Circulation desk, display areas.

¹⁴ Office, working and sorting areas, staff room.

¹⁵ Children, juvenile and adult collections; popular, general print.

¹⁶ Study tables; comfortable reading areas; study/listening/viewing carrels.

¹⁷ Small program room.

¹⁸ Community information; newspaper collection; local history.

¹⁹ Includes storage and mechanical.

This is lower than actual costs for other recent library projects, but will allow a reasonable quality of institutional development. It would likely allow a building similar to the Norwich branch. The estimate also includes customary allowances for other project costs such as fees, contingencies and site development. Costs associated with additional library materials are not included in these estimates.

Table 2.4.2 Preliminary Capital Cost Estimate – New Tavistock Branch

Cost Category	Per Sq. ft.	New Tavistock Branch
New Construction:		
<i>New Construction,</i>	\$200.00	5,000 sq. ft.
Total Building Construction		\$1,000,000
Site Development (10%)		\$100,000
Net Construction Estimate		\$1,100,000
<i>Contingency (8%)</i>		\$88,000
Equipment & Fitments (10%)		\$110,000
Net Total		\$1,298,000
Consultant Fees (8%)		\$103,840
Total Estimated Capital Cost		\$1,401,840

In addition to the capital costs noted above, increased operating costs will be incurred at a new Tavistock branch. These will be primarily related to an increase in staff necessary to accommodate increased use. In addition, some occupancy costs not now covered by the OCL will likely be associated with this new library. The Norwich branch, which is similar in size, provides a useful comparison for the purposes of estimating these increased operating costs. Both the existing Tavistock and the Norwich branch are open 35 hours per week, but Norwich achieves circulation levels that are more than three times those at Tavistock (47,680 and 13,134 respectively in 2006). While this may not be entirely attributed to the facility, clearly Tavistock will be a much better used library when replaced with a modern, up-to-date building. Staffing levels reflect use and are 2.1 and 1.1 FTE at Norwich and Tavistock respectively. Net operating costs in 2006 were \$121,000 at Norwich compared to \$79,000 at Tavistock; the difference largely reflecting staff costs. Based on this comparison, we should expect a net operating cost in current dollars of about \$110,000 at a new Tavistock library. This represents an operating budget increase of about \$30,000 annually.

With the addition of the proposed new branch library in Tavistock, the only other municipality that would have a shortage of library space is South West Oxford. There is a current space deficiency of 3,500 sq. ft., which will be exacerbated somewhat by population growth. There will be a short fall of some 4,000 sq ft of library space by 2021. This shortfall is driven in large part by the fact that South West Oxford is currently served by two of the OCL's smallest branches (Brownsville and Mount Elgin). However, the current shortfall in library space is not reflected in the current use of the two libraries or any indication of user dissatisfaction, presumably because residents are using libraries in other municipalities. Furthermore, it does not appear that future population will be concentrated in one location in South West Oxford, and to the extent that the growth is adjacent to Ingersoll, residents are probably using this library. For these reasons, we suggest that no immediate steps be taken to address this shortfall. Rather,

use of the existing libraries serving this part of Oxford County should be monitored and library space augmented only when warranted by unmet demand.

Recommendation 7: A new branch of about 5,000 sq feet should be provided library as soon as possible to replace the existing Tavistock library.

Recommendation 8: No further expansion of library space is recommended to meet the needs of population growth at this time. Use of existing facilities and indicators of unmet demand should be monitored, especially in the south west area of the County, and addressed as warranted.

2.4.3 Total Number of Library Branches in the OCL System

In 2005, the OCL closed five small library branches. The decision was made to respond to changing demands, levels of use and financial considerations. There was, of course, considerable local opposition to the closing and in two cases community volunteers have continued to provide some library services at former locations. While perspectives on this differ, there is no indication that the closings significantly affected the quality of library service or levels of use in Oxford County. Indeed, perhaps partially in response to the closings, the community has become more involved in a number of the remaining branches, levels of use are improved, and the remaining small libraries appear to be meeting needs in the community.

The discussion of trends in the Planning Context Report strongly suggests that small branches, with limited services and limited hours of operation, will be less relevant in the future. Consequently, it is possible that the future of the small libraries in Oxford County will ultimately be determined by the “marketplace” – with library users choosing to drive by a small branch to access a full service branch at a greater distance from their home. However, use and membership data for small branches in OCL do not indicate this is currently the case. Some of the small branches are extremely well used and most have experienced stable to growing use in recent years²⁰. The levels of satisfaction reported by survey respondents also indicate continuing support for small libraries²¹. This appears to be at odds with the experience in other communities and might reflect unique attributes of Oxford County (or, as noted above, might be a response to the threatened closure of small branches two years ago).

The most frequently cited reason for maintaining small libraries is to ensure adequate access. Most library planning guidelines indicate that the maximum travel time to the closest library should be 15 minutes in urban areas and 30 minutes in rural areas. This is the guideline adopted by ARUPLO. Despite this guideline, many communities feel that a 30 minute trip is too long, but few would suggest that something in the order of 20 minutes is unacceptable, particularly in rural areas where residents must travel by car to access most services. (The survey results in Chapter 6 of the report indicate that a significant majority of all current library users are within a 10 minute drive of the library they use – this is self reported and may not be entirely accurate, but would suggest that current patrons enjoy very immediate access). While most libraries would be within a 10-15 minute drive time²², in some cases, such as Harrington, access to another service point is not possible within the 30-minute guideline. If Tillsonburg

²⁰ See Chapter, 4, Planning Context Report

²¹ See Chapter 6, Planning Context Report

²² See Table 5.1, Planning Context Report

and Woodstock are not included in the calculation, there are other libraries that would exceed the 20-minute travel time (e.g. Brownsville). In some jurisdictions, there are reasons other than drive time that planners use to justify localized library services. Populations isolated for reasons of restricted mobility related to age, infirmity or income may warrant localized services. Another consideration might be cultural or linguistic separation from the larger community justifying a separate branch library. These appear to be relevant considerations in Oxford County given that some special populations are strongly associated with an existing library (e.g., the Dutch community and the Burgessville branch).

It was also frequently noted that the small libraries are the only source of high speed Internet in some parts of Oxford County. This is a service that will continue to attract users to the small, rural branches for the foreseeable future.

Finally, cost is a consideration. Generally speaking, the higher the number of small branches in the library system, the higher the operational costs. Higher per circulation or per member costs are generally associated with these smaller library facilities. These impacts are felt across the entire system, and may delay the introduction of other desired service improvements (such as extended hours of operation) due to operating cost restrictions. However, these costs are not significant relative to the overall operating budget and given increasing use, strong community support and some limitations on access, the investment appears warranted.

In Chapter Three of the report we have recommend that the OCL adopt a detailed policy position with respect to the future of the small branches, with clear performance measures and a commitment to close libraries in the future if use does not justify their continued operation. However, at this time, there is not an indication that the library users in Oxford County have made the decision to abandon small branches in favour of medium or large branches elsewhere in the system. There are, therefore, legitimate reasons to maintain small branches in the OCL system.

Recommendation 9: While an increase in the number of OCL library branches is not indicated, all existing branches should be retained.

CHAPTER THREE: OPERATIONAL AND MANAGEMENT ISSUES

3.1. Introduction

The primary focus of the study was future facilities. Recommendations, cost projections, and policy requirements were to be focused on those associated with future facility requirements. While we have generally restricted our discussion to these areas, we have commented on a number of program and service issues that are not directly associated with facilities. Operational and management issues are discussed under the following headings:

- Policies in Support of the Recommended Facility Model
- Service Improvements
- Future Planning

3.2 Policies in Support of the Recommended Facility Model

3.2.1 Facility Funding Responsibilities

There is no single approach in Oxford County for funding day-to-day building costs associated with library facilities. These are costs associated with the maintenance and operation of the facilities, but not the construction of new libraries or the direct provision of library services (e.g. they exclude staffing; purchase of materials; marketing; programming; administration etc.) Facility costs are funded in a variety of ways. These include:

- The Library Board paying all facility costs at Norwich, Ingersoll, Plattsville, and Thamesford (for their share of total building area in shared facilities).
- The Library Board acting as a tenant, essentially paying rent to local municipal authorities who own buildings that include libraries, in Brownsville, Burgessville, Embro, Innerkip, Mount Elgin, and Princeton.
- The Library Board cost sharing with the local municipality for the rent of a privately owned building in Otterville.
- The Library Board does not pay rent but covers building operating costs at Tavistock and, to a lesser extent, at Harrington.

There is no rationale for the various funding approaches; the parties involved have simply negotiated them over time. A standard approach, largely consistent with current practices, would see all large and medium libraries funded by the County, with small libraries remaining the responsibility of the local municipality. This approach has the following advantages:

- It ensures all major facilities are consistently funded and resources are available to maintain a consistent quality of service.
- The large and medium libraries are most likely to have service areas that extend beyond the local municipal boundaries.

- The small libraries, in addition to serving a local market, may increasingly represent an enhanced level of service. This will be the case if the small libraries meet fewer needs of future library users. It is appropriate therefore that the local municipality determines if it is prepared to support this level of service.
- A consistent approach would be established for the funding of all facility costs.

Recommendation 10: The OCL should adopt a consistent approach for the future funding of library facility costs. While options should be explored, consideration should be given to the County funding large and medium branches with the local municipality funding all facility costs associated with small branches.

3.2.2 Capital Contributions for Small Library Improvements

The scope of this project did not involve a detailed assessment of possible minor facility upgrades at the branches. These upgrades might include painting and other cosmetic improvements; major internal restructuring to create improved lobby, reception areas and circulation desks; mechanical system upgrades (heating, air circulation, etc.); new shelving, etc. When the Library Board toured the facilities in 2007, a number of possible improvements of this nature were identified. The suggested improvements appear reasonable and where practical should be pursued. However, the OCL's capital budget for the period 2006-2017 only allocates \$48,500 to these types of facility upgrades (excluding moveable furniture, computers and electronic equipment). This represents about \$6,000 annually for the small libraries. Given the current state of these libraries, this appears inadequate.

In addition to these minor upgrades, some of the small libraries will face legislated improvements that could be very costly. The Accessibility for Ontarians with Disabilities Act, 2005 will require all public facilities to be fully accessible. This is currently not the case at a number of the small libraries (accessibility limitations exist at Burgessville, Otterville, Brownsville, Embro and Harrington, as well as Tavistock although these will be corrected with a new building). The cost of achieving full accessibility will depend on site specific considerations and will vary from one site to another. However, even minor improvements to achieve wheelchair access would likely cost \$30-50,000 per branch. In addition to accessibility concerns, a number of these libraries are also older facilities and capital conservation costs should be anticipated. These costs will likely be prohibitive unless planned for in advance. Consequently, the municipalities responsible for these libraries should establish capital reserves for this purpose. Finally, a study should be undertaken to determine the most feasible and cost effective approach to fulfill the accessibility requirements. Costs should be determined and reserve fund contributions adjusted as necessary. A review of the five buildings noted and a preliminary cost assessment for achieving accessibility guidelines would likely cost \$5-10,000.

Without the benefit of detailed information based on branch-by-branch assessments, it is difficult to determine the appropriate allocation of funds for these upgrades and improvements. Current allocations, however, are inadequate. Until additional information is available, it is recommended that an annual allocation of \$20,000 be committed to a reserve for facility upgrades. This is intended to support a Library reserve fund, which can be used to leverage other funds, including external grants, and those provided by the local municipalities, to support facility upgrades and any legislated requirements imposed by senior levels of government.

As noted above, it is not clear how future facility costs will be shared between the Library Board and local municipalities. We have recommended that these cost-sharing arrangements be clarified and confirmed. Until that time, however, both the Library Board and local municipalities with small libraries should be encouraged to establish capital reserves for this purpose.

Recommendation 11: Additional funds should be committed to facility upgrades and improvements for the small libraries.

Recommendation 12: OCL should establish a reserve fund to finance improvements and upgrades that will be required to meet standards established by senior levels of government and to address capital conservation needs. An allocation of \$20,000 annually is recommended until actual costs are confirmed.

Recommendation 13: Local municipalities should be encouraged to establish reserves to fund their share of future facility costs.

3.2.3 Small Library Policy

While we have recommended that the existing small libraries be retained, indications are that these libraries will experience declining use because they will be increasingly at odds with expectations and needs of users. The Board should clarify its position with respect to these branches by adopting a small library policy.

Confirm Maximum Service Standards for Small Libraries

The Board should confirm maximum service standards for the small libraries based on the OCL guidelines recommended in Section 2.3 of the report. These guidelines describe appropriate levels of service on a number of dimensions (e.g. hours of operation, size, seating and computer access). The Small Library Policy should make it clear that these levels of service would be maintained but not increased. In situations where maximums are stipulated (e.g. number of operating hours), actual hours would depend on levels of use.

Identify Minimum Facility Standards

As discussed above, a number of the small libraries are housed in older buildings with design and functional limitations. Improvements have not been undertaken, although some improvements are represented in the OCL capital budget for the period 2007-2016. If these branches will be a continuing part of the OCL system, the policy on small libraries should define minimum facility standards. These standards should include:

- As per the Accessibility for Ontarians with Disabilities Act, 2005, all branches should be upgraded to achieve an acceptable standard of accessibility, including *at minimum* barrier free access to all library resources and barrier free, accessible washroom facilities; and
- Contemporary standards for today's libraries for such things as lighting, air circulation, heating and cooling, etc.

Establish Minimum Performance Standards

Finally, the policy for small libraries should define minimum performance standards. All libraries (including large and medium branches) should be monitored on an annual basis to track changes in use relative to cost and minimum standards should be established for retaining the facility. Relevant performance standards would include:

- Total annual circulation;
- Proportion of total annual circulation made via on-line catalogue holds;
- Average number of library visits per week;
- Total active library membership per branch; and
- Average cost for each of these indicators.

Other less quantifiable standards might also be adopted, including community outreach and use of the library by community organizations. Methods to monitor this will need to be established.

Minimum performance standards should be established and the Small Library Policy should indicate that the status of branches not achieving these minimum standards on an ongoing basis would be reviewed with the intent of correcting the situation or closing branches that no longer are required to provide acceptable library service. While the intent is not to provide a trigger that automatically closes a branch that experiences declining use, the policy does commit the Board to reviewing these branches on a regular basis using pre-determined performance criteria. Branches experiencing declining use may be provided with an opportunity to explore reasons why and if possible reverse this trend. However, the policy would also clearly communicate the Board's intention of closing branches where the cost of service provision cannot be justified based on community use.

Recommendation 14: The OCL Board should prepare a Small Library Policy that clarifies the role of these libraries, appropriate service standards, minimum facility requirements, and minimum performance standards.

3.3 Service Improvements

The following service improvements were identified during consultations for this study. The focus of this study was library facilities, and these issues were not investigated in depth as part of the current study. Nonetheless, the limitations noted here appear reasonable and warrant further investigation and action on part of the Board.

3.3.1 Marketing and Promotion

Lack of familiarity with library services was frequently noted as a limitation of the OCL. Most commentators felt the Library provides insufficient information on existing services and this has a detrimental impact on community use and support.

Research in Ontario and elsewhere clearly indicates troubling perceptions of public library services. There is evidence to suggest that public support for libraries is diminishing because Ontario residents do not think the library

provides essential services. Further, these residents feel that libraries will be less relevant in the future, particularly as other sources of electronic information are increasingly available. Many Ontario residents are unaware of new service initiatives in the public library sector (e.g. digital library) or new services at the local library (e.g. downloadable audio books). Lack of awareness and use undermines support for the public library. Decreasing support contributes to fewer tax supported resources and less ability to serve the community. This is a disturbing trend that must be corrected by public libraries if they are to maintain their public and political support and consequently command the resources necessary to survive. To the extent that this diminishing perception of public libraries is based on inaccurate and outdated perceptions of library service, they must be corrected with improved marketing and promotion.

The absence of a marketing plan and effective marketing programs was frequently noted by staff and Board members in interviews for this study. Currently, marketing is not well represented in job descriptions for OCL staff, and would largely fall to the CEO and Branch Services Librarian. Additional staff would be required to fully address expanded marketing responsibilities. This position might also assume an expanded programming role as discussed below.

Finally, improved signage is an immediate action available to the OCL to improve its image and awareness in the community. Signage at OCL branches is very poor. There is no consistency and no obvious “brand” with which the public can associate. We understand that as per the County’s Visual Identity Policy, all signage must use the County of Oxford wordmark. This is appropriate, but the primary concern is that the library signage be visually attractive, conspicuous, functional and increase the identity and awareness of the branch. Furthermore, in many cases signage is limited, not only at the branch but also in the larger community directing people to the branches. This should be corrected. Additional investigation is required to determine the costs associated with a comprehensive signage program for the OCL. For the purposes of this assessment, we have assumed \$1,500 per site (design, preparation and installation) for a total cost of \$19,500.

Recommendation 15: Improved marketing and promotion is required for OCL services. Marketing should be assigned to a new staff position with shared responsibility for programming and marketing.

Recommendation 16: Improved signage is required for the OCL branches. Consistent signage should be prepared for all branches.

3.3.2 Expanded Programming

The OCL should explore opportunities to expand programming at all branches. Programming can complement increased marketing and provide a stronger connection to the community. OCL branches are constrained in their program offerings by the absence of dedicated program space and by limited staff resources. While the OCL does not control program areas at its smaller branches, it is fortunate to have access to multi-purpose space in community buildings co-located with libraries at all locations except Otterville. These could be used to a greater extent for programming. In some cases, such as the Princeton branch, the library could have access to a very high quality presentation area that is part of the museum. In addition, museum staff is available to potentially co-program this space. To date this has largely not occurred, primarily because library staff has no time to organize programs.

There may be similar opportunities to co-program space at Embro and Harrington with community associations who are active users of these buildings.

The medium and large OCL libraries all have (or in Tavistock's case will have) dedicated program space. The primary constraint on programming appears to be staff time. Currently, program duties would rest with the CEO and the Branch Services Librarian, however, we understand that the staff responsible for programming at Ingersoll is also a resource to other branch staff. To effectively extend programming, a staff position with this specific responsibility should be created. This position could be responsible for marketing (as discussed above) as well as programming and support OCL staff at all branches with both activities.

Recommendation 17: The OCL should explore opportunities to expand programming at all branches, but most importantly at the small branches to create a stronger connection to the local community. Program development should be assigned to a new staff position with shared responsibility for programming and marketing.

3.3.3 Hours of Operation

Current hours of operation at OCL branches have developed over time without a clear rationale. They are not necessarily based on levels of use or local demand for library services, and extreme variations in circulation per hour of operation are apparent. For example, Norwich, Thamesford and Tavistock are open 35 hours per week with average circulation/hour/week of 26.6, 12.4 and 7.2 respectively. Comparable figures for Burgessville and Brownsville, both open 15 hours per week, are 49.1 and 11.6.

We have provided direction on hours of operation in the guidelines proposed in Section 2.3 of the report. These are stated as minimums for medium branches and maximums for small branches and therefore provide some latitude to be tailored to specific situations. Criteria should be established for setting hours at OCL branches in a manner that better reflects use and adjustments to operating hours made on this basis.

Many library systems are attempting to offer Sunday operating hours, however, this is still rare for County systems in Ontario. This may reflect the rural nature of their service areas. In Oxford, there may also be communities that are less comfortable with Sunday library service. Over 78% of library users responding to the study survey indicated they were satisfied or very satisfied with hours of operation. Only about 15% specifically requested Sunday hours of operation, which is a considerably lower proportion than we have found in recent surveys of other County systems. This information suggests that there is no immediate need to offer Sunday service at OCL branches. Demands should be monitored, however, and Sunday hours offered at a few of the larger branches as warranted in the future.

Recommendation 18: The OCL should review hours of operation at all branches, adopt formal criteria for setting hours that reflect demand and use, and make adjustments to current hours of operation, as warranted.

Recommendation 19: The OCL should monitor demands for Sunday service and respond in the future, if warranted based on community demand.

3.4 Future Planning

3.4.1 A Strategic Plan and Business Plan for OCL

In addition to recommending this Facility Plan, the OCL Operational Review²³ recommended that the Board prepare a Strategic Plan and Business Plans. These recommendations are still relevant and would confirm and support the directions indicated in this report. The following discussion is taken from the Operational Review and addresses this subject.

- “The OCL does not have a Strategic Plan authored and endorsed by the Board. A preliminary draft of a Strategic Plan was prepared by staff but has not been adopted by the Board and has no official status.
- The Board has discussed preparing a Strategic Plan but has not yet undertaken the project.
- In the absence of a Board approved Strategic Plan, the OCL has not articulated anticipated outcomes or desired standards of library service.
- The OCL has a policy that indicates it will annually review planning objectives, the extent to which objectives have been realized, and appropriate objectives for the coming year, but this does not appear to happen within the context of any long-term, comprehensive planning documents. Indeed, in the absence of a Strategic Plan or other planning documents that identify anticipated outcomes, it would be difficult for the Board to undertake this activity.
- The Board has received the OCL 2006 Business Plan²⁴. While the Business Plan discusses key customers, core services and key partners, and ultimately articulates “System Wide Goals and Objectives” for the coming year, there is no clear connection between the Business Plan and short or long term goals for library service in Oxford County. Indeed, the Business Plan “goals and objectives”, as stated, are actually a list of tasks and short-term projects to be undertaken subject to available resources. How these tasks relate to the OCL’s Mission, Core Business or anticipated outcomes for library service is not clear. Whether these tasks, or others, are the most appropriate is therefore impossible to determine.

The OCL does not have the plans required by the Board and senior staff to effectively manage library service delivery or to determine if available resources are appropriately committed. This undermines any attempt to assess the overall efficiency or effectiveness of the OCL. In the absence of clearly stated and appropriate goals and objectives that have been approved by the Board, it is difficult to evaluate staff’s performance or to determine a reasonable allocation of funds relative to the desired level and type of library service in Oxford County”.

Recommendation 20: The OCL should implement the recommendations of the 2006 Operational Review with respect to improved planning processes.

²³ Oxford County Library. Operational Review. April 2006.

²⁴ OCL has prepared a 2007 Business Plan since the Operational Review was presented. However, the comments concerning limitations of the 2006 Business Plan remain valid.

3.4.2 Planning and Evaluation of Library Services

Planning and ongoing evaluation of library services should be a regular activity. Planning guidelines and recommendations, including those in this report, should be reviewed annually and updated as warranted. Updates may be in response to changing local circumstances (e.g. revisions in population growth forecasts) or general trends affecting library services in Ontario.

The OCL should also identify a number of simple performance measures to assist with the ongoing evaluation of library services. The Library already collects a good deal of information on circulation, membership and other service indicators on a monthly and annual basis. It is not clear, however, that this data is used in a formal manner to track changes in service or to plan for the future. Selected indicators that monitor circulation, remote access and use, in-library use of materials, membership, and use by place of residence would be helpful for planning purposes. Financial, user or population baselines will be required for comparative purposes (e.g. circulation per capita; or cost per item circulated, etc.). Changes in these measures should be tracked over time and comparisons made among different libraries in the system.

Finally, the Library should occasionally (every 2-3 years) administer a simple on-line survey similar to that used for this study to investigate the needs and perceptions of users. Using on-line technology these surveys are relatively simple and inexpensive to conduct. On-line survey products specifically for libraries are also available and may be useful. These surveys can provide extremely valuable information not available from other sources. If the same questions are used, changes in user satisfaction and perceived needs can be tracked over time and used to evaluate the Library's performance.

Recommendation 21: The OCL should implement an ongoing process for planning and evaluating library services that incorporate the recommended facility and service guidelines; selected performance measures, and periodic surveys of users.

CHAPTER FOUR: IMPLEMENTATION

4.1 Introduction

Table 4.1 describes the next steps in an implementation approach. These provide a general framework and timing for implementation of the study recommendations. Table 4.2 provides a summary of possible cost implications of report recommendations (in 2007 dollars).

Table 4.1: Implementation

Steps	Timing	Tasks	Discussion
Board Approval of the Report	2007	Board review and acceptance of report recommendation	Implementation can proceed as soon as Board provides authorization
Detailed Planning Studies for Tavistock Branch	2008-9	Additional studies are required to confirm space requirements; a location; detailed design and costs.	These studies should be initiated as soon as possible. If started in 2008, detailed design could be complete in early 2009 and the new branch library could be in place before the end of the year, 2010
Initial Implementation of Policies and Procedures in Support of the Facility Model	2008	The Board should adopt the policies and guidelines identified in this report for supporting the facility model	These policies include the facility hierarchy, the Small Library policy, and confirmation of the building funding model.
Strategic Plan	2008	The Board should undertake a Strategic Planning process and update its business plans and service evaluation	
Accessibility Study and Signage	2008	A study should be undertaken of the branches requiring accessibility upgrades to determine the most feasible approach and anticipated costs. Implement Signage Program	Accessibility study should be undertaken in 2008 to allow time to plan for required expenditures.
Ongoing Upgrades to Existing Facilities.	2008 - 2018	Facility upgrades should be prioritized and initiated in 2008 with investment continuing as warranted and subject to available funds	The extent of these costs and the time necessary to undertake all upgrades to be determined.
Operational Planning to Accommodate New Tavistock Branch	2009	The OCL should prepare a strategy to address staffing requirements, materials acquisition etc. prior to the opening of the new branch.	
Marketing and Program Strategy	2008-09	Implement expanded marketing and programming	Requires additional staff resources.

The following are preliminary estimates of costs associated with the study recommendations. In all cases, additional work is required to determine actual costs. See main text of the report for additional explanation of each item and the basis for the cost projection.

Table 4.2: Preliminary Cost Estimates

Capital Costs	
Item	Amount
New Tavistock Branch Library:	\$1,401,840.00
Contribution to Reserves/Facility Upgrades	\$20,000.00 annually
Signage Program	\$19,500.00
Study of Building Accessibility Requirements and Costs	\$5-10,000.00
Operating Costs	
Additional Operating Costs – Tavistock Branch	\$30,000.00 annually
Staff Position – Marketing and Programming	\$40,000.00 annually