



**THE CORPORATION OF THE TOWNSHIP OF TAY  
SPECIAL GENERAL GOVERNMENT & FINANCE COMMITTEE**

**APRIL 24, 2017  
5:00 P.M.**

**MUNICIPAL OFFICE – COUNCIL CHAMBERS**

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1. **CALL TO ORDER**
2. **DECLARATION OF PECUNIARY INTEREST**
3. **ADOPTION OF THE AGENDA**
4. **CONSIDERATION OF BUSINESS FOR WHICH NOTICE WAS GIVEN**
  - 4.1 Presentation from TCI Management Consultants – Re: Library Master Plan.
  - 4.2 Presentation from the Tay Township Public Library Board – Re: Library Master Plan.
5. **ADJOURNMENT**



**Tay Township Public Library**

# **Library Master Plan**

**Council Presentation**

*April 24, 2017*

**TCI Management Consultants • Beth Ross Associates • Bibliotechs Inc. •  
Reich+Petch**



# Proposed Agenda

Part A: Context (*What We Did*)

Part B: Situation Assessment (*What We Found*)

Part C: Recommendations and Implementation (*What We Recommend, Priorities and Timing*)



## Part A: Context

# Purpose of this Master Plan (1)

*Work with the Community, Library Board, Council and Staff to:*

- 1. Identify issues, constraints, opportunities and threats for the Library.*
- 2. Identify and prioritize goals and objectives*
- 3. Assess programs, services, facilities and collections*
- 4. Assess future needs in library services*
- 5. Review future facility needs and assess service options*



## Part A: Context

# Purpose of this Master Plan (2)

6. *Assess sustainability of 3 branch system*
7. *Develop a technology plan*
8. *Create a fiscal plan*
9. *Create an implementation plan*
10. *Provide a report to the Library Board to make future recommendations*



## Part A: Context

# Activities Undertaken

- Documentation review
- Demographic analysis
- Facilities review
- Technology review
- Benchmarking review – 6 other systems
- Staff, Library Board and stakeholder interviews
- Community survey (423 responses)
- Community workshops (200+)
- Steering Committee Meetings and Workshop



# Steering Committee Members

- Bob Coryell (Steering Committee and Library Board)
- Heather Walker (Head Librarian)
- Councillor Cate Root (Steering Committee and Library Board)
- Fran Roosen (Steering Committee)
- Victoria Réaume (Steering Committee)
- Joan Hamilton (Steering Committee)
- Kathryn Beemer (Steering Committee)



## **Part B: Situation Assessment**





## Part B: Situation Assessment

# Tay Public Library - Strengths

- Excellent staff
- Good collection
- Simcoe County Cooperative gives good ILS at affordable cost
- Most liked service from Tay's corporate plan
- Do a lot with relatively small funds
- Good technology infrastructure
- Shared management and technology infrastructure with Township and County
- Passionate community support of existing 3 branch system



## Part B: Situation Assessment

# Tay Public Library - Weaknesses

- Uneven distribution of library services
- Challenges with computers
- No technology plan to tie in with library service goals
- Limited space in facilities allows little room to process 4400 new items annually
- Inadequate staff resources with retirements and little technical training for replacement staff
- Rural areas remote from branches
- Budgets are generally limited
- Not meeting Library standards



## Part B: Situation Assessment

# Tay Public Library - Opportunities

- Develop a formal technology plan
- Better computers, and IT servicing
- More use of e-resources?
- Possibly expansion to meet Library standards
- Possible community hub in Waubaushene?



## Part B: Situation Assessment

# Tay Public Library - Threats

- Aging population
- Some drift away from library use / competition from other forms of entertainment / data access
- Possible challenge to operate three branches in longer term
- Location and size of Library could limit recruitment of qualified staff
- Some patrons require technology skills

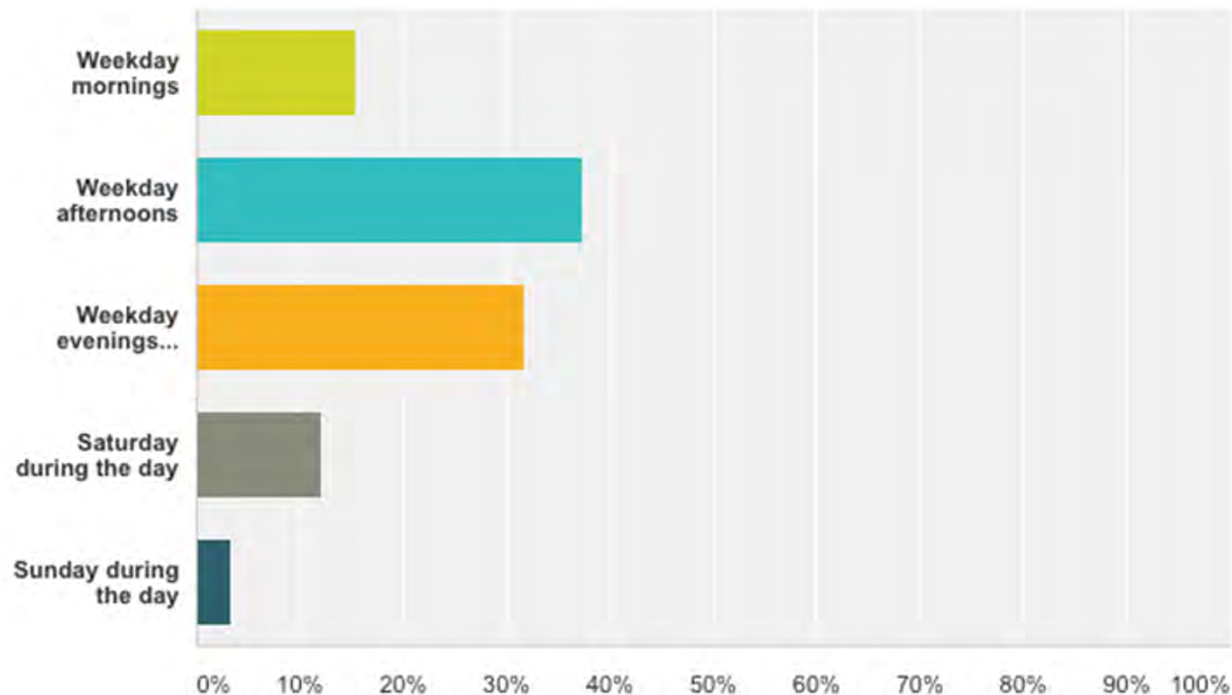
## Part B: Situation Assessment

# Hours of Operation



Which of the following is the most convenient time of the week for you to use the library? Please choose one only

Answered: 214 Skipped: 39



## Part B: Situation Assessment

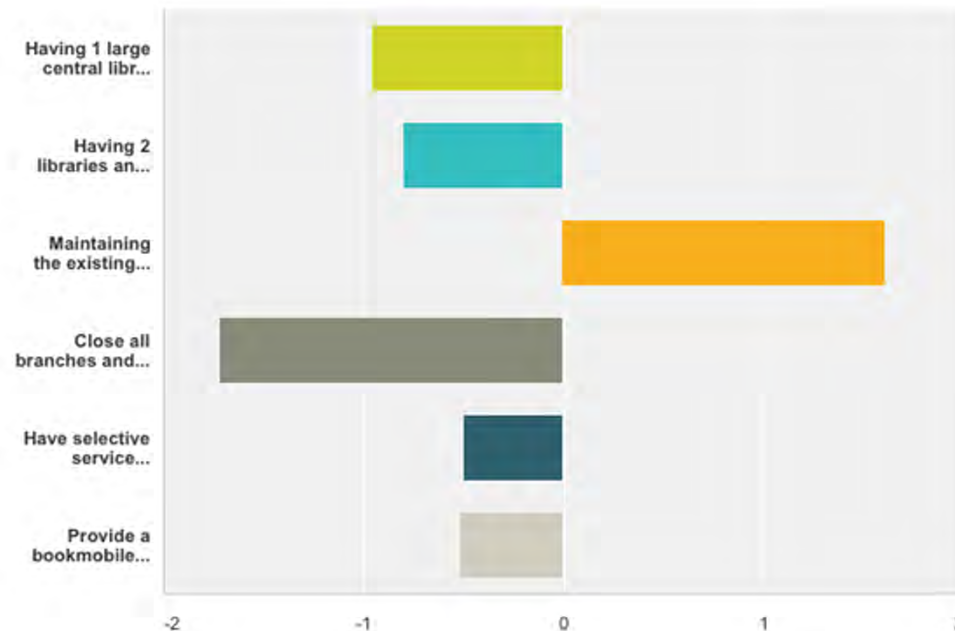
# Future Service Options

Definitely support (2); Somewhat support (1); definitely not support (-2)



The following are some future possible service delivery options for delivery of library services in Tay Township. Would you support or not support each of these options?

Answered: 210 Skipped: 43



## Part B: Situation Assessment

# From the Benchmarking



	Tay Twp	Average
Cardholders as % of Pop'n	23%	44%
Local funding per capita	\$34	\$42
Full-time staff	0	1.3
Staff costs per capita	\$24	\$32
Staff hours per hour open	1.9	1.8
Annual circulation per cardholder	28	20
Main & branch service hrs/week	87	75
Program attendance / 1000 pop'n	297	569
Service points / 10,000 pop'n	3.2	4.1

Communities include: Clearview, Georgian Bay, Grey Highlands, Ramara, Selwyn, Severn

## Part B: Situation Assessment

# From ARUPLO Guidelines



Community	Estimated Population Served	Current Size (s.f.)	ARUPLO Guidelines (s.f.)
Port McNicoll	4,400	4,249	4,400
Victoria Harbour	4,400	1,876	4,400
Waubashene	2,200	1,657	2,500

Assignable library space is considered as **net** square feet  
– **gross** square feet (GSF) is estimated at 25%.

ARUPLO – Administrators of Rural and Urban Public Libraries of Ontario  
OPLG – Ontario Public Library Guidelines





## **Part C: Recommendations and Implementation**



## Part C: Recommendations and Implementation

# Recommendations

- 20 recommendations made, in 8 areas:
  - 1) *Facility Improvements*
  - 2) *Accreditation*
  - 3) *Use of Neighbouring Library Systems*
  - 4) *Hours of Operation*
  - 5) *Outreach*
  - 6) *Technology*
  - 7) *Programs*
  - 8) *Management and Staffing*



## Part C: Recommendations and Implementation

# Priorities and Timeframe

Priority	
High	A must do: implementing the recommendation should have first call on time and resources
Medium	After the high priority recommendations, medium priority should be undertaken
Low	After medium priority recommendations, as time, energy and resource permit
Recommended Timeframe	
Immediate	Within the next 2 years – 2017 or 2018
Short Term	Within the next 5 years – 2019 – 2021 and beyond as required
Medium Term	Within 5 to 10 years – 2022 to 2027 and beyond as required
Long Term	10 to 20+ years out – post 2027



## Part C: Recommendations and Implementation Facilities

Recommendation	Assumptions	Timeframe	Priority	Estimated Capital Costs (rounded, in \$2016)	Estimated Additional Annual Operating Costs (rounded, in \$2016)
Recommendation 1: Maintain Existing Three-Branch System Over the Next Decade	By itself, will not entail any incremental capital or operating costs	Immediate	High	\$0	\$0
Recommendation 2: Undertake Urgent Repairs to Waubaushene Branch	Minor costs for door repair and painting	Immediate	High	\$117,000	\$0
Recommendation 3: Undertake Interim Expansion of Victoria Harbour Branch	Refresh existing space plus fit out Harbour Shores room	Immediate	High	\$276,000	nominal
Recommendation 4: Undertake Upgrade and Accessibility Improvements to Port McNicoll Branch	Improvements as outlined in Appendix C will be undertaken	Medium-Term	High	\$893,000	\$0
Recommendation 5: Food Service in the Branches is Not Recommended at this time	Will not incur any additional cost on either the capital or the operating side	Immediate	Medium	\$0	\$0



## Part C: Recommendations and Implementation Facilities (Long Term)

Recommendation	Assumptions	Timeframe	Priority	Estimated Capital Costs (rounded, in \$2016)	Estimated Additional Annual Operating Costs (rounded, in \$2016)
Recommendation 6: Library branches should meet ARUPLO Standards in the Longer-Term	<p>A) to be accomplished through expansion of Port McNicoll and Victoria Harbour, and relocation/expansion of Waubashene: capital costs will be significant (see Appendix C)</p> <p>B) space-related operating costs outlined as per Appendix C</p>	Long-Term	High	Estimated as \$2,376,000 – \$4,170,000 (see Appendix C)	Up to \$30,000 in additional building-related operating costs (see Appendix C)



## Part C: Recommendations and Implementation

# Accreditation

Recommendation	Assumptions	Timeframe	Priority	Estimated Capital Costs (rounded, in \$2016)	Estimated Additional Annual Operating Costs (rounded, in \$2016)
Recommendation 7. Establish Accreditation of the Library System Over the Next 5 Years:	Will not incur any additional costs but will result in a truer cost accounting of Municipal Clerk position	Immediate MOD and Short-term	High	\$0	\$0



## Part C: Recommendations and Implementation

# Use of Neighbouring Library Systems

Recommendation	Assumptions	Timeframe	Priority	Estimated Capital Costs (rounded, in \$2016)	Estimated Additional Annual Operating Costs (rounded, in \$2016)
Recommendation 8: Explore the Feasibility of Reimbursement for Memberships in Neighbouring Library Systems, or Service Agreements:	Assume here that Tay pays for service agreements for both Midland and Springwater (likely a maximum figure)	Immediate Investigation and Medium	Medium	\$0	\$165,000 (maximum)



## Part C: Recommendations and Implementation

# Hours of Operation

Recommendation	Assumptions	Timeframe	Priority	Estimated Capital Costs (rounded, in \$2016)	Estimated Additional Annual Operating Costs (rounded, in \$2016)
Recommendation 9: Re-allocate Existing Hours of Operation in Branches to Provide Continuous Service	Will not incur any additional cost on either the capital or the operating side; this would just represent a re-allocation of existing resources	Immediate	High	\$0	\$0
Recommendation 10: Explore Sunday Opening as a Pilot Project in 2017	Nominal additional budget required (e.g. 10 weeks times 8 hours per week – i.e. two students over a 4-hour period in the afternoon)	Immediate	High	\$0	\$2,000





## Part C: Recommendations and Implementation Outreach

Recommendation	Assumptions	Timeframe	Priority	Estimated Capital Costs (rounded, in \$2016)	Estimated Additional Annual Operating Costs (rounded, in \$2016)
Recommendation 11: Increase Outreach Services to Those Who Cannot Readily Access Branches	Courier service is accelerated to 2-3 times per week; at the same time, more active marketing efforts should be in place to encourage awareness and interest	Short-Term	High	\$0	\$2,000



## Part C: Recommendations and Implementation

# Technology

Recommendation	Assumptions	Timeframe	Priority	Estimated Capital Costs (rounded, in \$2016)	Estimated Additional Annual Operating Costs (rounded, in \$2016)
Recommendation 12: Adopt the Technology Plan Outlined in Appendix D	See Appendix D for details	Short-Medium	High	\$0	\$5,000 (likely)
Recommendation 13: Investigate Purchasing of Shelf-Ready Materials	Cost of technology estimated in Appendix D	Short-Term	Medium	\$0	\$3,000



## Part C: Recommendations and Implementation Programs

Recommendation	Assumptions	Timeframe	Priority	Estimated Capital Costs (rounded, in \$2016)	Estimated Additional Annual Operating Costs (rounded, in \$2016)
Recommendation 14: Involve Volunteers in the Development and Delivery of New programs	Some staff time involved in training and working with volunteers, but not separately costed	Medium Term	Medium	\$0	\$0

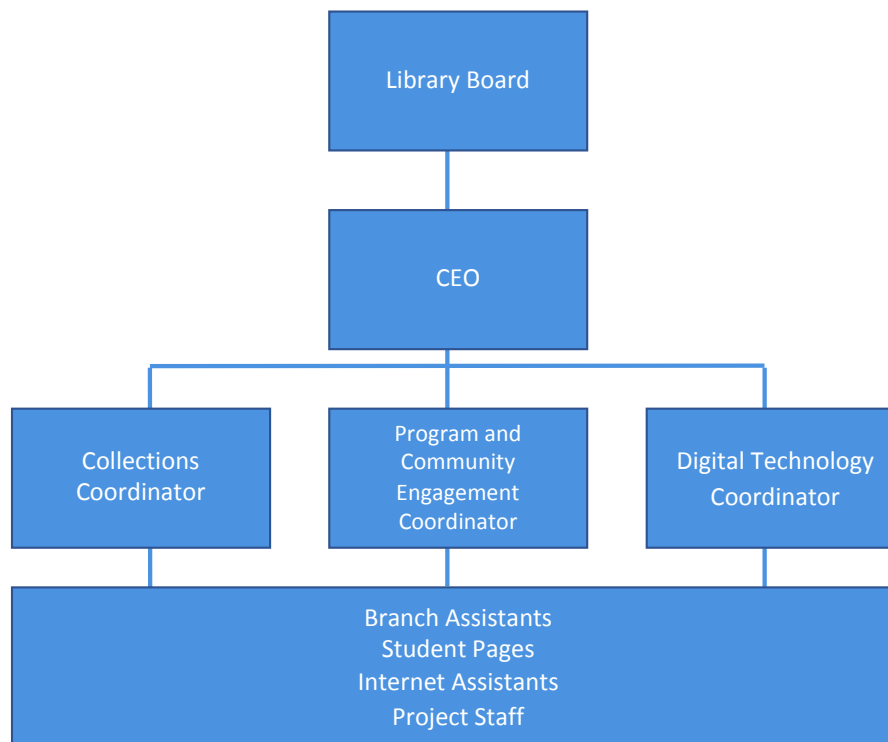


## Part C: Recommendations and Implementation Management and Staffing (1)

Recommendation	Assumptions	Timeframe	Priority	Estimated Capital Costs (rounded, in \$2016)	Estimated Additional Annual Operating Costs (rounded, in \$2016)
Recommendation 15: Develop Succession Plan for Head Librarian	Assume that salary and benefits package could range from \$50,000 to \$80,000 – assume mid-point of this range	Immediate	High	\$0	\$40,000 (estimated additional costs over existing wages paid)
Recommendation 16: Create Program and Community Relations Coordinator	Assume that salary and benefits package could range from \$40,000 to \$60,000 – assume mid-point of this range	Medium Term	High	\$0	\$25,000 (estimated additional costs over existing wages paid)
Recommendation 17: Reconfigure Branch Manager System to a Functional Orientation	Some additional training may be required to 'groom' individuals into their coordinator roles, but this is covered in training budget in Recommendation #19	Short-Term	Medium	\$0	\$0

## Part C: Recommendations and Implementation

# Proposed Functional Organization





## Part C: Recommendations and Implementation Management and Staffing (2)

Recommendation	Assumptions	Timeframe	Priority	Estimated Capital Costs (rounded, in \$2016)	Estimated Additional Annual Operating Costs (rounded, in \$2016)
Recommendation 18: Revise Job Descriptions to Reflect Future Responsibilities	Will requires staff time but not entail any additional out-of-pocket expense	Short-Term	High	\$0	\$0
Recommendation 19: Increased and More Regular Staff Training Should Be Instituted	Target budget allocation is 1% to 2.5% of operating budget, which would imply a budget between \$4,000 and \$10,000 – assume half way point	Short-Term	High	\$0	\$7,000
Recommendation 20: Consider Establishment of Friends' Group	Minimal effort other than staff time	Short to Medium	Medium	\$0	\$0
Total Estimated Additional Cost Over the Implementation Period (in \$2016)				\$3.662 - \$5.350 million	\$332,000

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# Library Master Plan

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***Report submitted to  
Tay Township Public Library  
(RFP 2016-40)***

***December 2016***



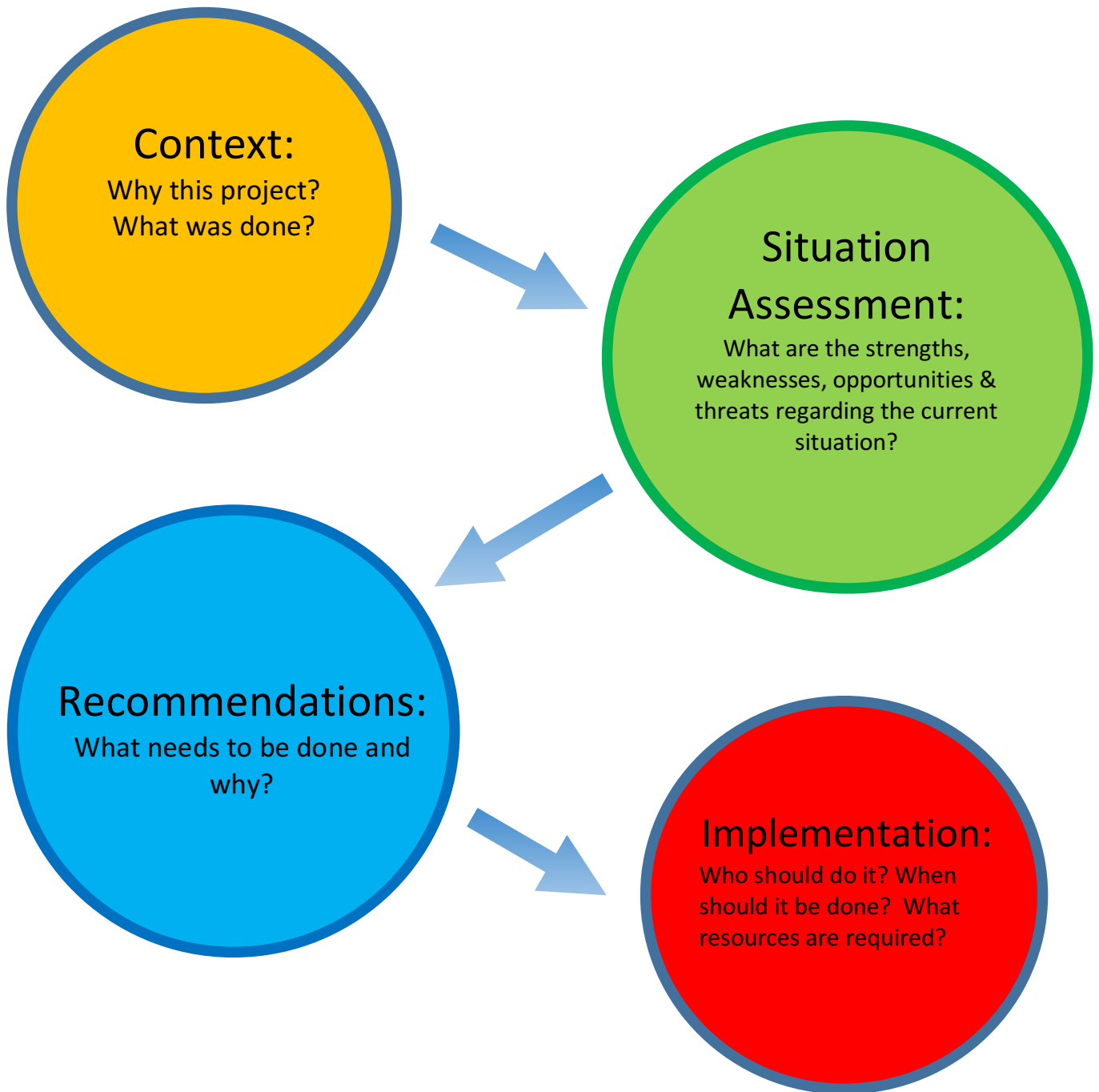
in association with

**Beth Ross & Associates  
Bibliotechs Inc.**



# Tay Township Public Library Master Plan

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# Executive Summary

## Introduction

Tay Township Public Library is a three-branch system servicing a permanent resident population of 9,800. (The population increases by approximately 20% in the summer season, and many of these cottagers are also Library users.) The system has grown significantly in the last 25 years with expansions to the Port McNicoll branch in 1996 and Victoria Harbour branch in 2007 and a retrofit of Waubauskene branch in 1992 (which was just prior to its amalgamation into Tay Township in 1994). The Library service is a vital community resource and hub for a wide range of activities. In order to continue to offer exceptional services, the Library Board decided to engage a consultant to develop a Master Plan. The overall purpose of this project is to provide the Tay Township Public Library with a Master Plan that is created and supported by the community, Library Board, Council and Staff.

A team comprising TCI Management Consultants (strategic and master planning specialists), Beth Ross and Associates (library operations expert); Reich + Petch Architects, and Bibliotechs Inc. (library technology specialist) was retained after a selection process to undertake the project.

## Activities Undertaken

A number of activities were undertaken over the course of the project, including:

- **Documentation review** – reviewed various documents and statistics provided
- **Demographic analysis** – involving a review of current demographics and future projections for population
- **Facilities review** - involving a review of the three branches by the architect and other study team members
- **Technology review** – a review of Tay Library’s use of library technology and related policies was conducted by the team’s library technology specialist
- **Benchmarking review** – using Ministry data, Tay Township’s Public Library’s statistics were compared with those of 6 other public library systems of similar size and geographic characteristics.
- **Key Staff and Stakeholder interviews** - involving several confidential interviews with Library staff, Board members, municipal staff and the Mayor as well as Simcoe County Co-op of which Tay Library is a member
- **Community survey** – a confidential survey was designed and administered to the general public between August 19 and September 30, 2016. In total, 423 responses were received from the public survey which is an excellent response.
- **Community workshops** –Three public workshops were publically promoted and conducted, one in each of the three communities during the summer on the evenings of August 30 (Port McNicoll); August 31 (Victoria Harbour); and September 1 (Waubauskene) – in total, approximately 200 people attended these three meetings (some attended all of them)
- **Steering Committee meetings and workshop** – a Steering Committee was formed to advise the consulting team. The Committee was able to provide direction to the consultants regarding the future preferred service option, including branch configuration, hours of operation, staffing and enhanced service delivery options.

## Recommendations

In total, there are 20 recommendations that comprise the Master Plan. The table overleaf lists these, as well as showing the priority and implementation timeframe for each.

## Township of Tay Public Library Master Plan: Implementation of Recommendations

Recommendation	Priority	Timeframe			
		Immediate (2017-18)	Short-Term (2019-21)	Medium-Term (2022-27)	Longer-Term (2028+)
<b>Recommendation 1:</b> Maintain Existing Three-Branch System Over the Next Decade	High				
<b>Recommendation 2:</b> Undertake Urgent Repairs and Basic Upgrade to Waubauskene Branch	High				
<b>Recommendation 3:</b> Undertake Interim Expansion to Victoria Harbour Branch	High				
<b>Recommendation 4:</b> Undertake Upgrade and Accessibility Improvements to Port McNicoll Branch Undertake	High				
<b>Recommendation 5:</b> Food Service in the Branches is Not Recommended at this Time	Medium				
<b>Recommendation 6:</b> Library System should Adopt a goal of meeting ARUPLO Space Guidelines	High				
<b>Recommendation 7:</b> Seek Accreditation of the Library System within Five Years	High				
<b>Recommendation 8:</b> Explore the Feasibility of Reimbursement for Memberships in Neighbouring Library Systems, or Service Agreements	Medium				
<b>Recommendation 9:</b> Re-allocate Existing Hours of Operation in Branches to Provide Continuous Service	High				
<b>Recommendation 10:</b> Explore Sunday Opening as a Pilot Project in 2017	High				
<b>Recommendation 11:</b> Increase Outreach Services to Those Who Cannot Readily Access Branches	High				
<b>Recommendation 12:</b> Adopt the Technology Plan Outlined in Appendix D	High				
<b>Recommendation 13:</b> Investigate Purchasing of Shelf-Ready Materials	Medium				
<b>Recommendation 14:</b> Involve Volunteers in the Development and Delivery of New Programs	Medium				
<b>Recommendation 15:</b> Develop Succession Plan for Head Librarian	High				
<b>Recommendation 16:</b> Create Program and Community Relations Coordinator	High				
<b>Recommendation 17:</b> Reconfigure Branch Manager System to a Functional Orientation	Medium				
<b>Recommendation 18:</b> Revise Job Descriptions to Reflect Future Responsibilities	High				
<b>Recommendation 19:</b> Increased and More Regular Staff Training Should Be Instituted	High				
<b>Recommendation 20:</b> Consider Establishment of Friends' Group	Medium				

## Resource Requirements

Many of the recommendations, particularly in the immediate and short-term time periods, can be implemented within the existing envelope of resources. However, there will be some cost to implement other recommendations, particularly on the capital side. These costs are summarized below by the time period for implementation:

Time Period for Implementation	Cost Elements	Total Estimated Cost	
		Capital	Operating (Annual)
<b>Immediate / Short-Term (2017 – 2021)</b>	<ul style="list-style-type: none"> <li>- Refurbishment of Waubashene and Victoria Harbour branches</li> <li>- Potential reimbursements / service agreements with surrounding municipalities</li> <li>- Increased outreach services</li> <li>- Succession transition to new full-time CEO and Programs / Community Coordinator positions</li> </ul>	\$393,000	\$51,000
<b>Medium-Term (2022 – 2027)</b>	<ul style="list-style-type: none"> <li>- Refurbishment of Port McNicoll branch</li> </ul>	\$893,000	Immediate & short term costs carry on - in addition, additional \$198,000
<b>Longer-Term (2027 and on)</b>	<ul style="list-style-type: none"> <li>- Major expansion to existing branches to meet standards:               <ul style="list-style-type: none"> <li>- <i>Waubashene: relocation &amp; expansion</i></li> <li>- <i>Victoria Harbour: expansion</i></li> <li>- <i>Port McNicoll: expansion</i></li> </ul> </li> </ul>	\$2.4 to \$4.2 million	Immediate, short-term and & short term costs carry on – in addition, some additional operating costs associated with new space (estimated as up to an additional \$30,000 per year)

## Next Steps

It is recommended that this Master Plan be approved in principle first by the Tay Township Public Library Board and secondly endorsed by Council. This should occur as early in 2017 as possible. In approving the Master Plan, the Library Board should then refer it to staff for implementation. At the end of that year, a report on implementation activities in 2017 should be prepared by staff and presented to the Board and Council, outlining progress made as of that date, reasons why key initiatives may have been delayed or deferred, new opportunities that may have arisen, etc.

## Part A. Context

### 1. Background and Purpose of this Review

#### 1.1 Purpose of the Project

Tay Township Public Library is a three-branch system servicing a permanent resident population of 9,800. (The population increases by approximately 20% in the summer season, and many of these cottagers are also library users.) The system has grown significantly in the last 25 years with expansions to the Port McNicoll branch in 1996 and Victoria Harbour branch in 2007 and a retrofit of Waubaushene branch in 1992 (which was amalgamated into Tay Township in 1994). The system has grown from manual systems in the last 20 years to automated systems offering a wide range of programs and services throughout the community. A wide range of print and digital materials are offered including broadband internet, Wi-Fi access, digital reference, programs for children, teens and adults and community information services.

The library service is a vital community resource and hub for a wide range of activities. In order to continue to offer exceptional services, the Library Board decided to engage a consultant to develop a Master Plan. The overall purpose of this project is to provide the Tay Township Public Library with a Master Plan that is created and supported by the community, Library Board, Council and Staff.

#### 1.2 Master Plan Objectives

To quote directly from the Request for Proposal, *“The study has the following specific objectives:*

- 1. To work with the Community, Library Board, Council and Staff to **identify issues, constraints, opportunities and threats** for the Library.*
- 2. To assist the Community, Library Board, Council and Staff with the **identification and prioritization of goals and objectives** for the Library.*
- 3. To undertake an **assessment of existing programs and services, facilities and collections**, through a comprehensive public consultation process (workshops and meetings) that targets users and non-users of all ages, the Library Board and staff and other key stakeholders and partners. **Prioritize current services and new services** that will address the community’s service priorities for the next five years.*
- 4. Assess the impact of existing and future growth patterns and project the anticipated community needs in all areas of library services (collection development, borrower services, information services, programming), technology, facilities and staffing, with consideration as to the sustainability of the existing system.*

5. Provide a **review of current facilities to address repair, maintenance and renewal needs and identify possible alternative service options** with consideration as to the **sustainability of the existing three branch system**.
6. Assess the library's current service delivery model in relation to Item No. 4 & 5 and as to **whether or not a small three branch system is a sustainable model** with the current trends in library service (i.e. growth in eBooks and online resources vs. declining branch visits
7. Review the current IT Capital plan and develop a **detailed technology plan** that takes into consideration direct service delivery to the public, and support technology to expand service levels.
8. Create a **Fiscal Plan** to accomplish needed changes to services, facilities and staffing for the next 15 years taking into consideration existing operating and capital cost information, as well as deficiencies identified over the same period.
9. To assist in the creation of a **"Strategic Plan"**, resulting from the Master Plan that provides guidance for the future implementation of identified goals and objectives.
10. Provide a **report to the Library Board** that may be used to make future recommendations on all aspects of the Library to Township Council.

## 2. Project Team

Following a competitive tendering process, the team of TCI Management Consultants with Beth Ross & Associates, Bibliotechs Inc., and Reich + Petch Architects, were selected to conduct the core service review.

The integrated skills sets/ that each firm brings to the project are summarized below:

Firm	Particular Expertise for this Review
<b>TCI Management Consultants</b>	<ul style="list-style-type: none"> <li>- overall project management and lead consultants</li> <li>- data collection through interviews, surveys, focus groups</li> <li>- core service reviews</li> <li>- community consultations</li> <li>- project management</li> <li>- feasibility studies and business plans</li> <li>- strategic plan development</li> <li>- implementation planning</li> <li>- report writing and presentations</li> </ul>
<b>Beth Ross &amp; Associates</b>	<ul style="list-style-type: none"> <li>- library specialist</li> <li>- review of branches and assessment against industry guidelines and standards</li> <li>- strategic advice on public libraries</li> <li>- staffing, organization chart, competencies</li> </ul>
<b>Bibliotechs Inc.</b>	<ul style="list-style-type: none"> <li>- library technology and automation planning</li> <li>- library technology best practices</li> </ul>

<b>Reich + Petch Architects</b>	<ul style="list-style-type: none"> <li>- functional and space planning</li> <li>- review of facility requirements and constraints</li> <li>- site identification and assessment</li> <li>- capital cost estimates</li> </ul>
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Following the initiation of the study a project **Steering Committee** was formed by Tay Township to help guide the project and to actively provide advice to the consultants. The Steering Committee included the Chair of the Library Board, the Library CEO, the Head Librarian and four members of the public – one from each of Port McNicoll, Victoria Harbour, Waubaushene, and one representing rural Tay Township.

### 3. Activities Undertaken

The main sets of activities undertaken in the project include the following:

- **Documentation review** – reviewed various documents and statistics provided by the Library including annual Library surveys, Library newsletters, Library capital and operating budgets, operating statistics, organization chart and job descriptions, Tay Township’s Strategic Plan and related survey results. Using this data, a statistical profile of each of the branches was developed for further analysis.
- **Demographic analysis** – using data from Statistics Canada and Manifold Data Mining, demographic data was reviewed, particularly in order to determine population projections, demographic profile and its existing and future geographic distribution within Tay Township.
- **Facilities review** –The Library CEO led a tour of the three branches to familiarize the project team with the three branches. A facilities review was conducted by the architect project team member to review various strengths, weaknesses, attributes and possible future needs of the branches.
- **Technology review** – A review of Tay Library’s use of library technology and related policies was conducted by the team’s library technology specialist in order to make recommendations to improve the effectiveness and efficiency of library technology systems.
- **Benchmarking review** – using Ministry data, Tay Township’s Public Library’s statistics were compared with those of 6 other public library systems of similar size or geographic characteristics.



- **Key Staff and Stakeholder interviews** – The team conducted several confidential interviews with Library staff, Board members, municipal staff and the Mayor as well as Simcoe County Co-op of which Tay Library is a member.
- **Community survey** – a confidential survey was designed and administered to the general public between August 19 and September 30, 2016. The surveys were promoted by the municipality and the Public Library in each of the branches. The survey was available online using TCI's SurveyMonkey account and was also available in hard copy at the branches. The hard copy surveys were entered by the consultants into a complete data set. In total, 423 responses were received from the public survey which is an excellent response.
- **Community workshops** – Three public workshops were publically promoted and conducted, one in each of the three communities during the summer on the evenings of August 30 (Port McNicoll); August 31 (Victoria Harbour); and September 1 (Waubaushe). The meetings were promoted by the municipality and the Public Library. A total of approximately 200 people attended the community workshops.
- **Steering Committee meetings and workshop** – A Steering Committee was formed to advise the consulting team. The team had an initial meeting with the Steering Committee October 6<sup>th</sup> followed by a planning workshop on November 8<sup>th</sup> to discuss and analyze a number of strategic options concerning the future of the Library. The second workshop included all members of the Library Board. Prior to the workshop, the Steering Committee was presented with a workshop package that included extensive analytical materials related to the current Library systems as well as future possible service configurations. Using these workshop materials, the Steering Committee was able to provide direction to the consultants regarding the future preferred service option, including branch configuration, hours of operation, staffing and enhanced service delivery options.

#### 4. Key Assumptions and Caveats

There are several key assumptions and caveats to keep in mind when reading this Report. These include:

- **Input is from interested and committed users, not a statistically representative sample of the population:** The public survey undertaken in the course of this review was one where those interested in the future of the library were most likely to respond. The respondents were self-selected because they chose to participate in the survey. A statistically representative sample of the Tay population, which is always a very expensive exercise, was not undertaken for reasons of timing and budget. (In any event, a Master Plan is more likely to benefit from a survey of those who are most familiar with

and knowledgeable about, the system, so a survey of users is entirely appropriate in this context). It is important to understand that the input does represent the opinions and perspectives of, in most cases, library users who wish to see the library systems continue to be strengthened in their communities.

- **Comparisons are indicative, not definitive:** In this Master Plan, certain use has been made of comparisons with other library systems in other municipalities. It is important to recognize that such comparisons are useful indicators of areas in which service improvements may be made, but not necessarily absolutely accurate. All library systems are unique, reflecting differences in the nature of the population base they serve; the territory they cover and the distribution of settlement; their physical facilities; their collections and how these respond to community demand; the choices of the Board and staff regarding programs to be offered; etc. As such, no comparisons can ever be exactly 'point to point' and definitive. Comparisons are useful as indicators of areas to be further investigated and where service improvements might be investigated.

## Part B. Situation Assessment

### 5. Profile of the Tay Public Library

#### 5.1 Overview

The following provides a basic statistical profile of the Tay Public Library and its three branches.

	Port McNicol	Victoria Harbour	Waubauskene	TOTAL
Branch size (s.f.)	4,249	1,876	1,657	7,782
Collection (volumes) <sup>(1)</sup>	22,777	13,414	12,602	48,793
Refurbishment/Retrofit (year)	1996	2007	1992	-
Hours open per week	34	31	22	87
2015 Circulation	24,489	21,644	11,146	57,279
2015 Program Attendance	571	300	675	1,546
2015 Visitors	11,090	12,848	7,065	31,003
Active cardholders <sup>(2)</sup>	841	969	430	2,240
Percent of circulation	43%	38%	19%	100%
Distribution of users	36%	41%	23%	100%
Distribution of cardholders	38%	43%	19%	100%
Estimated percent of pop'n served	40%	40%	20%	100%
Estimated population served	4,400	4,400	2,200	11,000
Circulation per hour open	13.9	13.4	9.7	12.7
Visitors per week	213.3	247.1	135.9	596.2
Visitors per hour open	6.3	8.0	6.2	6.9
Program attendance per week	11.0	5.8	13.0	29.7
Budget <sup>(3)</sup>	\$160,230	\$146,092	\$103,678	\$410,000
Cost / item circulated	\$6.54	\$6.75	\$9.30	\$7.16
Cost per hour open	\$90.63	\$90.63	\$90.63	\$90.63
Cost per visitor	\$14.45	\$11.37	\$14.67	\$13.22

Notes: (1) Port McNicol has a relatively larger number of volumes because it holds a large number of volumes in storage.

(2) Active cardholders are defined to have been used within the last two years.

(3) The branch budgets are derived by allocating the total Library budget by the hours open in each branch.

The Library's budget is \$410,000. Circulation is 57,000 in 2015 and has been declining slightly in recent years, a trend that has been experienced by many other public libraries in Ontario.

The Library branches are owned and maintained by the Township.

The data shows all three branches reasonably actively used by each community. Hours of operation vary from branch to branch depending on the needs of the community. The branches are closed during lunch hours and on Sundays, and evening hours are limited. The Library is doing its best to service the three communities with the hours and staffing available. Recommendations are made later in this Plan to optimize hours and staffing and to meet the preferred needs of the community as outlined in the public survey.

## 5.2 Hours of Operation

A visual representation of the hours of operation for each branch is shown below:

Start time	end time	Port McNicoll	Victoria Harbour	Waubauskene	Tay
<b>Monday</b>					
10:00 AM	11:00 AM				
11:00 AM	12:00 AM				
12:00 AM	1:00 PM				
1:00 PM	2:00 PM				
2:00 PM	3:00 PM				
3:00 PM	4:00 PM				
4:00 PM	5:00 PM				
5:00 PM	6:00 PM				
6:00 PM	7:00 PM	1			1
7:00 PM	8:00 PM	1			1
8:00 PM	9:00 PM	1			1
<b>Tuesday</b>					
10:00 AM	11:00 AM	1	1		2
11:00 AM	12:00 AM	1	1		2
12:00 AM	1:00 PM				
1:00 PM	2:00 PM	1	1	1	3
2:00 PM	3:00 PM	1	1	1	3
3:00 PM	4:00 PM	1	1	1	3
4:00 PM	5:00 PM	1	1	1	3
5:00 PM	6:00 PM				
6:00 PM	7:00 PM			1	1
7:00 PM	8:00 PM			1	1
8:00 PM	9:00 PM			1	1
<b>Wednesday</b>					
10:00 AM	11:00 AM	1	1		2
11:00 AM	12:00 AM	1	1		2
12:00 AM	1:00 PM				
1:00 PM	2:00 PM	1	1		2
2:00 PM	3:00 PM	1	1		2
3:00 PM	4:00 PM	1	1		2
4:00 PM	5:00 PM	1	1		2
5:00 PM	6:00 PM				
6:00 PM	7:00 PM	1		1	2
7:00 PM	8:00 PM	1		1	2
8:00 PM	9:00 PM	1		1	2

Start time	end time	Port McNicoll	Victoria Harbour	Waubauskene	Tay
<b>Thursday</b>					
10:00 AM	11:00 AM	1	1		2
11:00 AM	12:00 AM	1	1		2
12:00 AM	1:00 PM				
1:00 PM	2:00 PM	1	1	1	3
2:00 PM	3:00 PM	1	1	1	3
3:00 PM	4:00 PM	1	1	1	3
4:00 PM	5:00 PM	1	1	1	3
5:00 PM	6:00 PM				
6:00 PM	7:00 PM		1		1
7:00 PM	8:00 PM		1		1
8:00 PM	9:00 PM		1		1
<b>Friday</b>					
10:00 AM	11:00 AM	1	1		2
11:00 AM	12:00 AM	1	1		2
12:00 AM	1:00 PM				
1:00 PM	2:00 PM	1	1	1	3
2:00 PM	3:00 PM	1	1	1	3
3:00 PM	4:00 PM	1	1	1	3
4:00 PM	5:00 PM	1	1	1	3
<b>Saturday</b>					
9:00 AM	10:00 AM	1	1	1	3
10:00 AM	11:00 AM	1	1	1	3
11:00 AM	12:00 AM	1	1	1	3
12:00 AM	1:00 PM	1	1	1	3
1:00 PM	2:00 PM				
2:00 PM	3:00 PM				
3:00 PM	4:00 PM				
4:00 PM	5:00 PM				
<b>Sunday</b>					
10:00 AM	11:00 AM				
11:00 AM	12:00 AM				
12:00 AM	1:00 PM				
1:00 PM	2:00 PM				
2:00 PM	3:00 PM				
3:00 PM	4:00 PM				
4:00 PM	5:00 PM				
<b>Total Hours</b>		<b>34</b>	<b>31</b>	<b>22</b>	<b>87</b>

A discussion of the Library's organization and staffing is presented in Section 9.2.

## **5.3 Organization Structure**

The Library's organization structure is presented in graphic form in Section 9.2

The Library Board is composed of three at-large members and two Council representatives.

The Library CEO is also the Clerk of the Township, a somewhat unusual arrangement. It is estimated that she spends from 20% to 30% of her time on Library matters. However, the cost associated with this time is not included in the Library budget.

All other staff including the Head Librarian are part-time.

## **6. Profile of the Community**

### **6.1 Policy Context**

Tay Township was amalgamated in 1994 bringing together a number of smaller communities on the south shore of Georgian Bay. The Township has a unique cultural and natural heritage. It can claim to have one of Ontario's and Canada's earliest European settlements. Today, it offers permanent and seasonal residents a unique and attractive quality of life including excellent cultural heritage, an outstanding and varied natural environment including easy access to the waterfront, a blend of smaller urban and rural lifestyle opportunities, an affordable lifestyle as well as high quality amenities and services.

Because of its relatively small size, it is not overly wealthy. It does not have a large tax assessment base and most of the tax base is residential. Like many smaller townships in Ontario, Tay is challenged to continue to offer services without significantly increasing its taxes. The recent closures of longstanding Port McNicoll Public School, Waubaushene Pines Elementary School and Waubaushene Elementary School are symptomatic of the challenges that Tay Township faces and were very much on the minds of residents who participated in the Library planning study.

The three largest of Tay's amalgamated communities are Port McNicoll, Victoria Harbour and Waubaushene, each of which is home to one of Tay Public Library's branches.

The Township Strategic Plan provides some policy context to the provision of Tay's library services. In 2015, the Township adopted a Strategic Plan<sup>1</sup> with the following vision statement:

*The Township of Tay is a strong, cohesive rural community. We celebrate and promote our unique history, natural heritage and recreational amenities as the cornerstone to our quality of life. Our unique villages and towns support a host of events, services and businesses that contribute to growing local economy and create a unique destination experience for residents and visitors to the community.*

The Corporate Strategic Plan noted the challenges of the municipality in maintaining its services without increasing taxes. Regarding the library system, the Strategic Plan had the following recommendation:

***Assess the role and function of the Township's Library services.*** *While the Township's library network is well regarded, the traditional role and function of community libraries is changing. Sustaining three libraries will be challenging over the long term. Reframing the role of libraries as flexible community spaces / hubs may address this challenge. Tomorrow's libraries need to embrace technology.*

The recommendation, in part, led to the Library Board and Council's decision to develop this Master Plan.

## **6.2 Demographic Profile**

The following materials from Census Canada and Manifold Data Mining provide some background on Tay Township's current and future demographics.

### **Population and Household Size**

- 9,736 population (2011)
- 3,940 households
- average household size 2.47 persons (similar to Ont. average)

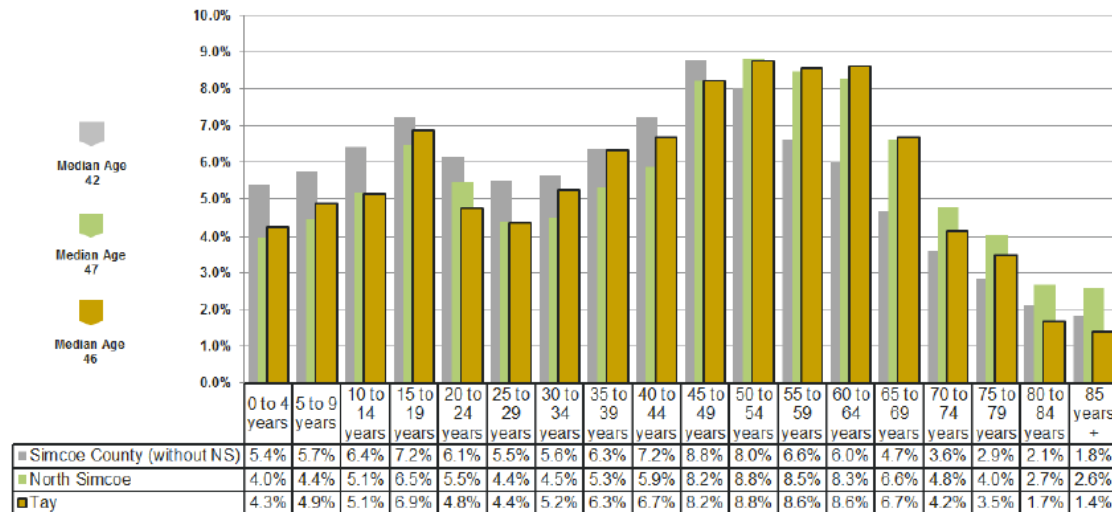
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<sup>1</sup> MDB Insight, Township of Tay, Corporate Strategic Plan, 2015 – 2018, October 2015, p.11.

## Distribution of Age Groups

- population aged 0-14: 13.9% – *low compared to provincial average of 16.3%*
- population aged 65+: 21.1% – *high compared to provincial average of 16.6%*

FIGURE 2: AGE CHARACTERISTICS IN 2011, TAY TOWNSHIP, NORTH SIMCOE AND SIMCOE COUNTY



Source: Statistics Canada 2011 Census Profiles

Note: The above chart is reproduced from the Corporate Strategic Plan, p.6.

## Population Projections

- population projected by 2025: 8,981 – *essentially static*
- households projected by 2025: 3,924 - *slight growth*
- average household size in 2025: 2.29 – *shrinking*

## Household Types

- lower proportion of 1-person households that provincial average (23.4% [Tay] vs. 26.9% [Ont.])
- much higher proportion of 2-person households that provincial average (41.7% [Tay] vs. 31.0% [Ont.])

## Family Types

- higher proportion of families with no children at home (48.5% [Tay] vs. 36.8% [Ont.])
- lower proportion of families with children at home (35.4% [Tay] vs. 46.4% [Ont.])



## Ethnicity

Ethnicity Origin	Tay	Ontario
British Isles origins	60.0%	39.6%
French origins	23.9%	11.0%
Aboriginal origins	12.1%	3.7%
Canadian	42.5%	23.9%

## Generation Types

Generation Types	Tay	Ontario
First generation	8.3%	30.2%
Second generation	14.2%	22.7%
Third generation and over	77.5%	47.1%

## Lifestyle Types

“Up the Ladder” – 31.9% compared to Ontario average of 14.2%

“High Trades” – 41.6% compared to Ontario average of 6.1%

“Joyful Country” – 24.4% compared to Ontario average of 3.3%

## Definitions for Manifold Lifestyle Types

### “Up the Ladder”

Middle class households in busy life-stage. Income (\$81,836) and home value (\$521,364) are slightly above the Canadian average. Household size is 2.53. 32% are French and many of them work in the sales and trades. More suburban dwellers with children age under 14, they spend high on healthcare plan, mortgage and life insurance premiums, childcare and cosmetics. In their precious leisure time, they read more about relationships, interior decorating, work on organic gardening and woodworking. Occasionally they ski. They think an important part of their life and activities is dressing smartly. Enjoy being extravagant, but think no-name products are as good as nationally advertised brands. Like both to go out with friend and entertain at home. Consider career as their first priority. More likely than the Canadian average to purchase personal watercraft, motor home, snowmobile, camping trailer, pool, motorcycle, and water cooler/water delivery service.

### “High Trades”

Working urban families. Income of \$80,030 and home value of \$578,756, they live more likely than average in apartment, detached duplex or semi-detached houses with 2.48 in household size. Educational level more likely to be high school, apprenticeship or trades. They work more than average in the agriculture in primary industries, in art, culture, recreation and sport, also as heavy equipment and crane operators. They read about natural health and romance. They do home renovation, some hunting and fishing. Open mind to new products and admire brand names. Convenience is more important than price when shopping. Pay attention to woman's right. More likely than average shopping at online department stores. More likely than the Canadian average to purchase motor home and motorcycle.

### “Joyful Country”

Rural households with large share of Francophones. Income \$77,779, home value \$371,575, household size 2.50. They spend more than average on house, gardening, recreation vehicles and insurance premiums,

gasoline and fuels, medicine, pet and bingo. They give 46% above average to non-religious charitable organizations. They work at home, in primary industry, the trades, transportation and heavy equipment operations. They hunt and fish more than average. When they make a purchase, they often spend more than they thought they would. Like shopping at Giant Tiger, but also online shopping. Looking for convenience, not price. Prefer to postpone a purchase than buy on credit and do more entertaining at home.

More likely than the Canadian average to purchase hot tub/spa, snowmobile, pool (above or in-ground), satellite dish, camping trailer, power boat (excl. personal watercraft), tires and water cooler/water delivery service.

## Household Income

- \$75,956 compared to Ontario average of \$94,952

## Education Levels

Highest level of educational attainment	Tay	Ontario
No certificate, diploma or degree	24.2%	18.7%
High school diploma or equivalent	29.4%	29.4%
Postsecondary certificate, diploma or degree	46.5%	54.6%

## 6.3 Summary

Tay is a unique community offering a high quality of life with wonderful community, cultural and heritage assets. At the same time, Tay's future will be challenged by its relatively small size, lower household income than average, essentially flat population growth and limited job opportunities for young people. The community has a high proportion of older residents, many of whom are attracted by its lifestyle and natural beauty. At the same time, the community's tax base is limited and it will be a challenge to continue to offer high quality services.

## **7. General Trends and Issues Common to Community Libraries Across Ontario**

### **7.1 Recent Trends**

There is considerable literature and documentation on the role of libraries in communities, their changing mandates in the world of technology, and how this all has an impact on library buildings. This section highlights some of these trends and their relevance to Tay Township Public Library.

#### **Core Library Service**

Libraries continue to be a safe and free destination where people come to borrow books, DVDs and other materials, as well as consult reference resources. Implications and indicators include:

- Universal access to information;
- Staff expertise to recommend books and provide reference information;
- Comfortable chairs for reading magazines and newspapers, or chat with others;
- People of all ages participate in programs and activities;
- Children attend story times and participate in summer reading programs;
- Comfortable seating, fireplaces, gardens contribute to quiet haven for reading;
- Separate quiet spaces for reading and study;
- Living room of the community.

#### **Life-long Learning**

Libraries are learning centres for all ages and abilities. Indicators include:

- Research for school projects;
- Home schoolers support;
- Computer training for different levels of ability and different ages;
- English as a Second Language programs;
- Literacy tutoring;
- Job searching support.

#### **Economic Development**

Libraries are spaces to stimulate local economic development providing support to local organizations and businesses. Indicators include:

- Source of local and community information;
- Excellent reference and search support;
- Space for small and home based businesses to research;
- Place to stimulate entrepreneurial activities;
- Small meeting spaces for entrepreneurs and small business;
- Good technology support;
- Job searching support.

## Technology Centre

Public libraries have embraced technology, becoming the bridge between technology and people. Public library service delivery has evolved significantly in response to the digital age and arrival of the Internet. Indicators include:

- Technology as tool for library operations;
- Go-to place for free access to the Internet;
- Knowledgeable staff;
- Equal access to online resources for rural residents;
- Online subscriptions, downloadable e-books, audiobooks, music, videos;
- Computers for public use, laptops and e-readers for loan;
- Service areas to support printing, scanning and faxing;
- Wi-Fi and electrical outlets for customers' use of their own devices in the library;
- Creation of digital content, especially about the community's history and genealogy;
- Computer training, makerspaces with 3D printers, digital studios.

## Customer Centred

Libraries have evolved to be customer centred to ensure that library users enjoy a positive experience. Indicators include:

- Comfortable spaces, expanded hours;
- Empowered front-line staff, flexible policies developed with the customer in mind;
- Surveys, feedback;
- Flexible to respond to changing community needs.

## Community Hub

Public libraries provide a destination for shared community and cultural functions. Indicators include:

- Small meeting rooms for tutoring, group study or projects, workshops, book clubs;
- Larger meeting rooms for presentations;
- Drop-in activities such as games and puzzles;
- Library programming provides a place for bridging social capital, where people from diverse backgrounds have an opportunity to meet and interact with others, making for a stronger, healthier community;
- Community and service groups use the library as a meeting place, thereby, facilitating community engagement;
- Visitors seeking local community information;
- Libraries support the local economy with their presence in downtown areas;
- Libraries are co-located near other public or cultural facilities and/or areas of high public usage;
- Libraries are the community meeting place.
- Destination for newcomers and new residents

Recently, the Province of Ontario issued a report, *Community Hubs in Ontario: A Strategic Framework and Action Plan*, which deals with hubs as a location where multiple health and

social services can be offered in a shared space with the intention of serving multiple or complex needs. There were few examples of libraries involved in this community hub model, but they certainly exist. The report may have missed an opportunity to involve libraries more, as public libraries are already well known in their communities as a safe, neutral place where people have access to information from professionals.

### **Partnerships**

Public libraries make connections with other community organizations to deliver programs.

Indicators include:

- Neutral and safe place to meet;
- Staff expertise;
- Participation in consortia or networks of other libraries to share resources, such as technology and digital resources;
- Destination in joint-use facilities with recreation or cultural centres, which can offer exciting opportunities for service delivery and programming;
- Sharing of space with partnership organizations;
- Library staff participates in community activities outside of the library to deliver programs and engage in community events and activities.

## **7.2 Implications for Library Facilities**

Best practices in library facilities are responsive to trends in library services and community development.

### **Library as Place**

Location is important for the library to be relevant and sensitive to its community. Libraries contribute to a vibrant downtown by bringing people to the centre of the community. Likewise, multi-use recreational facilities such as community and recreation centres can be a logical location for public libraries, allowing families and individuals to use several community services and participate in a wide variety of activities in one location. This is particularly popular for neighbourhood branches in a large municipality.

Any location needs to have safe and easy access for pedestrians. Attractive outdoor gathering places around the library also enhance quiet reading, people gathering, or access to the library's Wi-Fi after hours. The library should provide a sense of place and be responsive to community growth. It should be centrally located or co-located with a recreation centre or other municipal service.

### **Flexible for Changing Needs**

Technology and the role of the library as a community hub demand that the interior of the library be as flexible and open as possible for future changing priorities and uses. One-storey libraries with few walls for small and medium-sized communities are best. The use of zones for

overlapping and changing functions is popular. Space formerly required for growing collections of books is used to access technology or provide places for people to meet.

### **Customer Centred**

Attractive, comfortable and a variety of seating options including specialized children's and teen furnishings, and good signage throughout the library for easy wayfinding are all important. Shelving should be low enough to meet accessibility standards and include face-out displays and merchandising units. Self-service through self-checkout, online renewals and holds are important, as is staff being on the floor to assist visitors and researchers.

### **Collaborative Spaces**

From computer training centres and digital studios, small meeting rooms for tutoring and group projects and comfortable seating areas for book club discussions, to larger meeting rooms for presentations, the library should offer a variety of spaces for people to gather.

## **8. Strengths, Weaknesses, Opportunities and Threats Analysis**

### **8.1 Findings from the Benchmarking**

Ministry statistics were used to compare Tay Public Library with six other public library systems which were chosen either because of their comparable similar size and/or proximity to the GTA. These other libraries included Clearview, Georgian Bay, Grey Highlands, Ramara, Selwyn and Severn Township public libraries. The data is from 2014 which is the most recent available from the Ministry. Averages are presented for the group of seven libraries. Detailed benchmark tables are contained in Appendix E. As a cautionary note and as noted in Section 5.3, with the inclusion of a portion of the Library CEO's salary which is not currently allocated to the Library, Tay Public Library's true costs are actually somewhat higher than those used in the benchmark comparisons.

As noted in Section 4, comparisons are indicative, not definitive. In this Master Plan, certain use has been made of comparisons with other library systems in other municipalities. All library systems are unique, reflecting differences in the nature of the population base they serve; the territory they cover and the distribution of settlement; their physical facilities; their collections and how these respond to community demand; the choices of the Board and staff regarding programs to be offered; the nature of shared services with the municipality; etc. As such, no comparisons can ever be exactly 'point to point' and definitive. Comparisons are useful as indicators of areas to be further examined and where service improvements might be investigated.

The following are key findings from the benchmarking:

- Tay Public Library has 3.2 service points per 10,000 population compared to 4.1 for the group as a whole. (Note that this is an unweighted average. Using a weighted average, the group has 2.5 service points per 10,000, so Tay is more or less within the range).
- Tay Public Library's number of cardholders as a percentage of the population is quite low, at 23% compared to 44% for the group as a whole. Tay's library cards can be shared amongst family members which may explain its somewhat lower penetration rate.
- Local funding per capita is \$34 for Tay Public Library, somewhat lower than \$38 for the group as a whole.
- Tay Library's total operating expenditure is \$44 per capita compared to \$47 for the group.
- Tay Library's materials expenditure budget is 7% of total expenditures, compared with 10% for the group as a whole.
- Tay Library's staffing costs are 69% of its operating costs, somewhat higher than the group average of 60% which reflects the fact that overall, Tay's library budget is lower than other systems on a per capita basis<sup>2</sup>. Tay's staffing costs per capita are \$24, compared to \$32 for the group<sup>3</sup>.
- Tay Library's computer costs are 1% of operating expenses, somewhat lower than 3% for the group.
- Tay Library's cost per circulated item is \$6.86, somewhat higher compared with \$5.88 for the group.
- Tay Library's cost per service hour open is \$91, somewhat lower than the group average of \$98 for the group.
- Tay Library's number of circulating volumes held per 1,000 population is 5,346, somewhat higher than the group average of 4,659.
- The number of e-Resources held as a percentage of circulating volumes and e-Resources is 32% for Tay Library, somewhat lower than 58% for the group.
- Tay Library has 0 professional librarians<sup>4</sup> per 10,000 population compared to 0.4 per 10,000 for the group as a whole.
- Tay Library has 0 full-time staff compared to 1.3 for the group.
- The total number of staff hours for Tay Library is 161 which is high compared with 141 for the group.
- The number of staff hours per hour open is 1.9 for Tay Library which is comparable to the group as a whole which was 1.8.
- E-books and downloads as a percentage of all circulation is 37% for Tay Library, which is high relative to the group average of 17%.
- Tay's circulation per capita is 6 compared with 8 for the group.

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<sup>2</sup> In other words, if the overall library budget were larger, it is likely that non-staff costs would be larger as well, bringing the salary percentage cost more into line with that seen in other systems

<sup>3</sup> As noted, the Library CEO staffing costs are borne by the municipality and, therefore, not all Tay's staffing costs are included in the Library's operating expenditures

<sup>4</sup> The number of full time staff holding a degree in library/information science from an accredited school e.g. MLS, MIS, MLIS with the qualification recognized in the job class.

- Tay's circulation per cardholder is 28, considerably higher than 20, the average for the group of libraries.
- Tay Library's program attendance is 297 per 1,000 population, rather lower than 569 for the group.

On balance, Tay Public Library compares favourably with the group on a number of dimensions including hours open and circulation per cardholder. It compares favourably on volumes held. Also, its circulation of e-books and downloads as a percentage of all circulation is high relative to the comparables. Its cost per capita of \$91, compared to \$98 for the group can be perceived as relatively efficient. In contrast, it can also be perceived as under-resourced relative to its peers. Possible areas where there may be some opportunities for improvement include circulation per capita and program attendance which are somewhat lower than the comparators.

## 8.2 Findings from the Community Survey

A confidential survey was administered to residents of Tay Township and Library patrons between August 19 and September 30, 2016. The surveys were promoted by the municipality and the Public Library in each of the branches. The survey was available online using TCI's SurveyMonkey account and was also available in hard copy at the branches. The hard copy surveys were entered by the consultants into a complete data set. In total, 423 responses were received from the public survey which is an excellent response. The following summarizes the main responses (items in **bold type** represent the majority response for each question).

### A. About You

Q.1: Residence of Respondents:

Port McNicoll: 26.56% (111 respondents)

**Victoria Harbour: 37.8% (158 respondents)**

Waubashene: 30.62% (128 respondents)

Other: 5.02% (21 respondents)

- (Q.2) Vast majority had Tay Township as their **full-time residence** (88.76% or 371 respondents)
- (Q.3) Length of time living at residence varied- most common response was '**more than 20 years**' (36.67%)



Q.4: Age Range:

19 or under: 3.18%

20-29: 7.1%

30-39: 9.3%

40-49: 13.5%

50-59: 15.2%

60-65: 19.6%

**66-79: 26.2%**

80+: 6.1%

Q.5: Household Status:

➤ Majority of respondents were adult couples

Single: 17.9%

**Adult couple: 51.7%**

Family with some or all kids under 12: 16.8%

Family group with teens only: 4.8%

Other: 8.9%

Q.6: Library Usage

**Once a week or more: 37.6%**

Once every couple of weeks: 29.9%

Once a month: 10.1%

Once every few months: 9.6%

Once or twice a year: 6.9%

Less than once a year: 3.6%

Never: 2.4%

Q.7: Branch Usage

**Victoria Harbour: 39.4%**

Port McNicoll: 31.0%

Waubashene: 26.2%

No branch: 3.4%

## B. Your Level of Satisfaction with the Branches

Q.8 How would you rate the various facilities and resources provided by the Tay Township Public Library?

—	Very Satisfied —	Somewhat Satisfied —	Somewhat Dissatisfied —	Very Dissatisfied —	Can't Say / Don't Know	Total —
Number, location of branches	79.59% 312	15.31% 60	0.77% 3	1.02% 4	3.32% 13	392
Hours of Operation	48.21% 188	37.69% 147	8.21% 32	2.31% 9	3.59% 14	390
Print materials, range and variety	57.99% 225	30.67% 119	3.61% 14	1.03% 4	6.70% 26	388
Digital collections - eBooks, eAudio, eMagazines, etc.	36.72% 141	26.04% 100	2.86% 11	1.56% 6	32.81% 126	384
Range and variety of DVDs	44.50% 170	23.82% 91	3.66% 14	0.79% 3	27.23% 104	382
Genealogy and local history	31.48% 119	19.31% 73	2.38% 9	1.32% 5	45.50% 172	378
Quality of desktop computers	29.18% 110	22.28% 84	5.84% 22	1.86% 7	40.85% 154	377
Software loaded on desktop computers	27.15% 101	19.89% 74	4.57% 17	0.81% 3	47.58% 177	372
Access to Wifi	40.69% 153	15.69% 59	1.33% 5	1.06% 4	41.22% 155	376
Online / computer access	41.42% 157	15.30% 58	3.69% 14	1.58% 6	37.99% 144	379
Availability of quiet work and study spaces at the branch you most frequently use	36.32% 138	21.32% 81	6.32% 24	5.79% 22	30.26% 115	380
Availability of program and meeting spaces	33.33% 125	20.00% 75	9.07% 34	2.93% 11	34.67% 130	375
Availability/Quality of children's area	31.56% 119	21.22% 80	6.10% 23	2.39% 9	38.73% 146	377
Availability/Quality of teen/youth area	21.01% 79	13.03% 49	9.57% 36	3.46% 13	52.93% 199	376
Availability of food services in or near the library	21.29% 79	16.98% 63	8.63% 32	13.48% 50	39.62% 147	371
Quality and cleanliness of washrooms	55.09% 211	14.88% 57	1.83% 7	0.52% 2	27.68% 106	383
Overall appearance and ambience of the library at the branch you most frequently use	65.12% 252	27.91% 108	3.36% 13	1.03% 4	2.58% 10	387
Availability of parking	71.13% 276	18.30% 71	5.41% 21	2.58% 10	2.58% 10	388

- Overall, 'very satisfied' was the most significant response in each category (with the exception of several categories with a significant portion of 'can't say/don't know', likely reflecting the fact that respondents did not utilize services in that category)
- Patrons were most satisfied with 'number, location of branches'; 'print materials, range and variety'; 'quality and cleanliness of washrooms'; overall appearance and ambiance of the library'; and 'availability of parking'. All of these indicators were rated as 'very satisfied' by 50% or more of survey respondents.
- Many respondents marked 'can't say/don't know' regarding the use of different services.
- Patrons were most dissatisfied by the availability of food services in or near the library.
- Total 'somewhat dissatisfied' or 'very dissatisfied' ratings:
  - Availability of food services at or near the library – 22.1%
  - Availability/quality of teen/youth areas – 13.0%
  - Availability of quiet work or study areas – 12.1%
  - Availability of program and meeting spaces – 12.0%
  - Hours of operation – 10.4%
  - Availability/quality of children's area – 8.5%
  - Quality of desktop computers – 7.7%

Q.9: Comments on Ratings (most common- listed in order of frequency of comment):

**Waubashene:**

- Needs more space for materials/programming- very cramped
- Needs more parking spaces- barrier to access for elderly people that cannot walk distances if parked far away
- Longer/more convenient opening hours → current hours do not meet the needs of most patrons- respondents expressed that they would use library more frequently if hours were more convenient (respondents particularly requested evening hours)
- Staff were highly praised
- Great location
- Library makes good use of limited space

**Victoria Harbour:**

- Friendly and helpful staff
- Inconvenient hours of operation- respondents requested more evening opening hours
- Limited parking
- Lack of quiet work and study space

**Port McNicoll:**

- Friendly and helpful staff
- Inconvenient hours of operation- respondents requested more evening opening hours
- Small location→ however, several respondents expressed that the library makes good use of the limited space
- Limited computer access- two computers out of order
- No comfortable reading area

**General Comments:**

- Several respondents expressed that if their local library branch was closed (i.e. shut down) that they would not go to another library (due to distance, inconvenience, physical disability, etc.)
- Hard to attract people to move to towns with no libraries- dwindling of services
- Many respondents stressed the importance of libraries and the centrality of the library to their community
- Many respondents expressed that library closure would make it difficult for seniors without drivers' licenses to access libraries

**Q.10: Services Most Valued:**

- By far the most valued services were: **range of print materials (and inter-library loan service)**
- Computer access
- Wi-Fi access
- Staff as a resource
- Location (convenience)
- DVDs
- Hours of operation
- Children's books/area/programming

**Q.11: Suggestions Regarding Facilities for Consideration:**

- More space, larger library locations
- Longer hours
- Advertisement of services and programming
- Computer literacy training
- Refreshments
- Establish a "Friends of the Library" group to promote library interests independent of the CEO
- Physical and mental health programming
- Creation of meeting/reading rooms
- Access to libraries of Springwater Township and Midland (potentially through inter-library loans)
- More youth programming
- Increase accessible parking
- Equip computers with assistive technology programs for people with learning disabilities

- More adult programming- lecture series, classes, etc.

### C. Your Level of Satisfaction with Existing Library Services

**Q.12. How would you rate the following programs and services provided by the Tay Township Public Library?**

—	Very Satisfied (2) —	Some-what Satisfied (1) —	Somewhat Dissatisfied (-1) —	Very Dissatisfied (-2) —	Can't Say / Don't Know (0)	Total —	Weigh ted Average —
<b>Adult Programs</b>	<b>32.88%</b> 120	<b>20.82%</b> 76	<b>2.74%</b> 10	<b>1.92%</b> 7	<b>41.64%</b> 152	365	0.80
<b>Children's Programs</b>	<b>27.45%</b> 98	<b>13.73%</b> 49	<b>1.96%</b> 7	<b>1.40%</b> 5	<b>55.46%</b> 198	357	0.64
<b>Information and inquiry desk</b>	<b>81.55%</b> 305	<b>12.03%</b> 45	<b>0.80%</b> 3	<b>0.80%</b> 3	<b>4.81%</b> 18	374	1.73
<b>Library check out process (by staff)</b>	<b>83.29%</b> 314	<b>10.88%</b> 41	<b>0.27%</b> 1	<b>0.53%</b> 2	<b>5.04%</b> 19	377	1.76
<b>Inter-library loan service</b>	<b>70.08%</b> 260	<b>13.75%</b> 51	<b>1.08%</b> 4	<b>0.81%</b> 3	<b>14.29%</b> 53	371	1.51
<b>General Friendliness and Helpfulness of Staff</b>	<b>90.16%</b> 339	<b>6.12%</b> 23	<b>0.80%</b> 3	<b>0.80%</b> 3	<b>2.13%</b> 8	376	1.84
<b>Wifi availability</b>	<b>45.48%</b> 166	<b>10.96%</b> 40	<b>2.47%</b> 9	<b>0.82%</b> 3	<b>40.27%</b> 147	365	0.98
<b>Technology support</b>	<b>37.36%</b> 136	<b>14.29%</b> 52	<b>2.20%</b> 8	<b>2.20%</b> 8	<b>43.96%</b> 160	364	0.82
<b>Library web site</b>	<b>35.99%</b> 131	<b>23.90%</b> 87	<b>6.04%</b> 22	<b>1.37%</b> 5	<b>32.69%</b> 119	364	0.87
<b>Quality of online resources / databases</b>	<b>31.30%</b> 113	<b>19.39%</b> 70	<b>3.05%</b> 11	<b>1.39%</b> 5	<b>44.88%</b> 162	361	0.76
<b>Library program guide</b>	<b>32.12%</b> 115	<b>19.27%</b> 69	<b>2.79%</b> 10	<b>0.84%</b> 3	<b>44.97%</b> 161	358	0.79
<b>Overall customer experience service provided by the Library</b>	<b>81.17%</b> 306	<b>13.26%</b> 50	<b>1.06%</b> 4	<b>0.80%</b> 3	<b>3.71%</b> 14	377	1.73
<b>Provision of fire permits</b>	<b>62.33%</b> 230	<b>5.42%</b> 20	<b>0.54%</b> 2	<b>0.54%</b> 2	<b>31.17%</b> 115	369	1.28
<b>Good Food Box</b>	<b>36.57%</b> 132	<b>8.86%</b> 32	<b>0.83%</b> 3	<b>0.83%</b> 3	<b>52.91%</b> 191	361	0.80

Q. 12: Rating of Programs and Services:

**Most Satisfied:**

- General friendliness and helpfulness of staff (90.2% very satisfied)
- Library check out process (83.3% very satisfied)
- Overall customer experience (81.2% very satisfied)
- Information and inquiry desk (81.6% very satisfied)

**Few dissatisfied with programs/services. Of those Least Satisfied:**

- Library web site (7% somewhat or very dissatisfied)
- Adult programs (5% somewhat or very dissatisfied)
- Technology support (4% somewhat or very dissatisfied)
- Quality of online resources/databases (4% somewhat or very dissatisfied)
- Library program guide (4% somewhat or very dissatisfied)
- Children's programs (3% somewhat or very dissatisfied)

Q. 13: Comments on Programs and Services Ratings:

- Staff are an incredible resource
- Wifi very important to many respondents
- Many individuals and families cannot afford computers/internet – so for them access to internet is essential
- Several respondents expressed their appreciation for the Good Food Box service
- Library as a “community hub”
- Several comments on website being confusing/difficult to use
- Restricted hours and programming at all three libraries
- *“Recreational programming is very lacking (in Tay) and the libraries at least offer some programming”.*

Q.14: Most Valued Service (in order of frequency of response):

- Helpfulness and friendliness of staff
- Inter-library loan service
- Children's programming
- Wifi
- Good Food Box
- Adult programming
- \*Several respondents (4) indicated their most valued service was “just having a library”

Q.15: Additional Ideas for Services:

- Increased hours
- More computer/technology courses
- Programming for seniors
- More computers
- Increased programming for adolescents and adults
- Service for shut-ins
- Newcomer program
- Flyer/newsletter/community bulletin outlining services offered
- Physical and mental health programming

#### **D. Hours of Operation**

Q.16: Most Convenient Time for Library Usage:

Weekday mornings: 18.6%

**Weekday afternoons: 38.5%**

Weekday evenings (Mon-Thurs): 27.9%

Saturday during the day: 12.2%

Sunday during the day: 2.9%

#### **E. Accessibility and Diversity Issues**

Q.17: Disability/Special Need Restricting Library Access:

**No: 94.7%**

Yes: 5.3%

- Majority of disabilities described physical→ respondents noted importance of ease of access to library and accessible parking

Q.18: Does the library welcome diversity?

**Yes: 95.4%**

No: 4.6%

- One respondent noted that there is no special effort made to welcome diverse groups (“neutral rather than welcoming”)

Q.19: Satisfaction with Accessibility Issues:

Physical accessibility to the library

- **Very satisfied: 71.4%**
- Somewhat satisfied: 16.8%
- Somewhat dissatisfied: 3.5%
- Very dissatisfied: 1.3%
- Can’t say/don’t know: 7.0%%

#### General accessibility inside the library

- **Very satisfied: 68.3%**
- Somewhat satisfied: 20.4%
- Somewhat dissatisfied: 5.1%
- Very dissatisfied: 0.5%
- Can't say/Don't know: 5.7%

#### Accessible washrooms

- **Very satisfied: 55.8%**
- Somewhat satisfied: 11.6%
- Somewhat dissatisfied: 1.4%
- Very dissatisfied: 0.5%

#### Q.20: Comments on Ratings:

- Limited space within library (particularly at Waubashene) makes accessibility difficult-respondents mentioned difficulty with both strollers and wheelchairs
- Need more accessible parking spots
- Port McNicoll not wheelchair accessible
- Staff make a huge effort to accommodate accessibility issues
- Physical accessibility compromised in winter
- Several respondents expressed concern that library closure would be due to cost of addressing accessibility issues
- "Ontarians with environmental sensibilities cannot use most books that have been circulated into 'chemicalized homes'".

## F. Future Services

#### Q.21: Future Services

**Community information centre: 54.2% ('Definitely interested')**

More adult programming: 43.4%

More outreach to shut-ins, seniors' homes, etc.: 36.4%

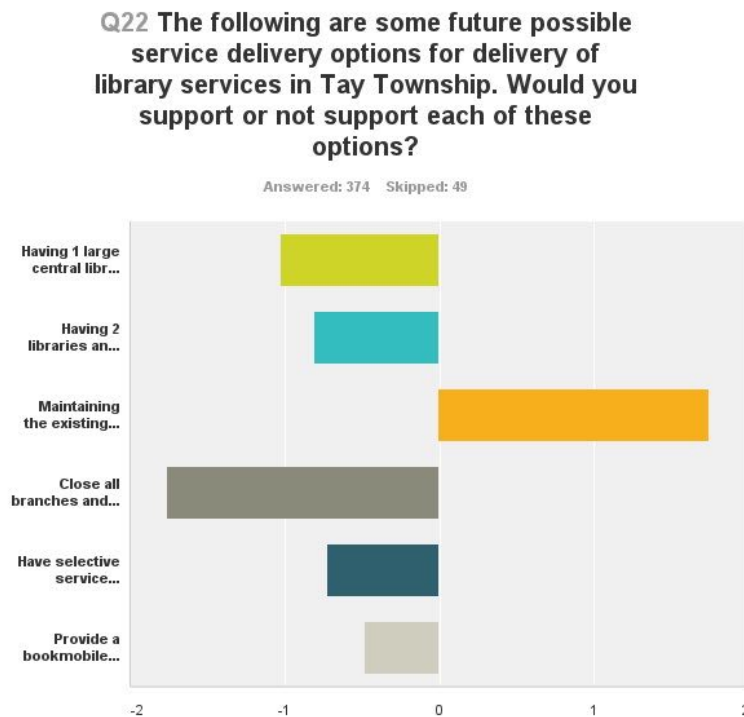
More early literacy programming: 35.7%

More space for local art, culture: 34.3%



## G. Future Service Delivery

### Q.22: Possible Service Delivery Options



Note: the chart above applies weightings to the responses as follows: Definitely support (2); Might support (1); Definitely not support (-2); Can't say/Don't know (0).

Having 1 large central library: 8.2%

Having 2 libraries: 5.8%

**Maintaining existing 3 branch system: 88.3%**

Close all branches: 1.7%

Have selective service agreements: 9.8%

Bookmobile service: 8.8%

### Q.23: Comments on Service Delivery Options

- Limited/no access to transportation makes closing branches an option that limits a lot of Tay Township residents
- Most respondents commented passionately on the need for maintaining the three branch system
- Libraries crucial for low income/low education residents
- Library is a community “hub”, breeds social connection and interaction
- Importance of libraries and reading for children
- Many respondents commented that they did not understand how the last two options would work in practice
- Some see the advantage of having one large library, but the vast majority did not

- Lots of respondents mentioned that the school was already closed in Waubashene and that students need access to a library
- Closing a branch library is short-sighted → “To maintain, and hopefully increase, the municipal tax base, the library can play a key role”. Potential residents want to move to towns with libraries

## H. Other Comments

### Q.24: Other Comments:

- Libraries should apply for grants instead of closing
- If libraries were amalgamated, the result would be fewer people using the service
- Emphasis on the point that often the library is the only access to computers/internet for lower income residents
- Many respondents expressed that they are happy with the way that the system works currently
- Importance of universal access to information and literacy
- Many Waubashene residents assume that it is Victoria Harbour that will remain open and Waubashene will be closed- Waubashene residents feel as though they get the “short end of the stick” when it comes to all services
- Small communities continue to lose important services
- Need more awareness about the available services so the libraries get more use
- Keeps children occupied in a productive (rather than destructive) way
- Several comments about financial sensibility of closing one/all libraries

## Summary of Survey Findings

Residents of Tay are generally satisfied with most aspects of their library services with strong support for friendliness and helpfulness of staff. Traditional print materials and inter-library loan are the most valued services. While there were low levels of dissatisfaction with any aspect of service, opportunity areas for possible improvement include the Library web site, adult and children’s programs, Library web site, technology support, Library program guide and quality of online resources/ databases.

Regarding hours of operation, Library patrons expressed a preference for weekday afternoons (39%) and weekday evenings (30%). Weekday mornings were favoured by 19% suggesting that the Library’s hours of operations may be an opportunity for some rescheduling.

The overwhelming majority of respondents were adamant that all three branches remain open since the Library is a vital part of each community. The most common concern cited was with regards to access. The largest proportion of respondents was in the 66-79 age range. As a result, there was a great deal of commentary regarding barriers to accessing a library that was

any further than their current branch. The importance of the library as a community “hub” was also reiterated. Multiple respondents mentioned that they cannot afford a computer or Internet and their only access to these technologies was at their local library. They mentioned that the lack of transportation in these communities meant that they would no longer be able to access these services. In summary, the overwhelming reaction was that all three libraries are vital parts of their communities and should be maintained.

### 8.3 Findings from Public Meetings

Three public meetings were publically promoted and conducted, one each in Port McNicoll, Victoria Harbour and Waubaushene. The meetings were well attended with about 50 individuals present in each of Port McNicoll and Victoria Harbour, and well over 100 at Waubaushene. The meetings were promoted by the municipality and the Library. In addition, some residents had posted notices around the community to the effect that a ‘hidden agenda’ was in play and that their Library branch was about to be closed (an incorrect perception) which led to high levels of concern and participation. The meetings were chaired by the Town Clerk / Library CEO. The consulting team presented the project objectives, early findings and moderated an open discussion.

As noted, the recent closures of the Port McNicoll Public School and Waubaushene Elementary School had hurt these communities and their impact coloured the discussions at the Library public meetings.

An overwhelming message from each of the public meetings was that each community highly valued its library branch and was concerned about possibly losing it.

There were a number of break-out questions posed by the consultants in each of the groups. The following presents a compilation of the ideas and responses to each of these questions. The questions included:

1. How important to you is the role of the library in the community? Can you describe the benefits the library provides?
2. What do you agree with / disagree with, in terms of what you have heard in the presentation?
3. What would you like to see in terms of new offerings from the library? (*programs, services, branches, staffing...*)
4. Is there anything that should be made more efficient or consolidated? (*programs, services, branches*)
5. What would be the top priority for change to improve overall service at the Tay Township Public Library? (*each person in the group can mention one thing*)

**1. How important to you is the role of the library in the community? Can you describe the benefits the library provides?**

- Indispensable for all kinds of reasons
- Community hub and resource centre; a destination point to connect with people
- Important place to get books, including large-print, audiobooks, DVDs, CDs, Inter-library loan
- A cost-free service (in terms of direct cost – most respondents were in fact aware that their library system was supported through tax dollars)
- An ethical way to borrow books and movies
- A great space for children's programs, preschoolers and moms with kids; need to keep young people coming in
- Critically important to expose kids to reading and other materials; development of literacy
- Access to wifi and the Internet is an essential service, particularly when service may be poor in rural areas
- Access to technical resources such as computers, fax machines, printers
- A link to the outside world
- An important social space, place to meet and greet neighbours, place to build community, exchange ideas freely and safely
- An affordable meeting space
- Critically important to those who have no access to transportation or who have mobility issues
- Critically important resource for those on social assistance
- A safe space and comfortable - air conditioned in summer and heated in winter
- Resources for all ages, preschoolers to seniors
- A convenient place to get fire permits
- If I don't have the Internet at home, I can use it at the library (children's group Waubaushene)
- Computers for homework, things to read, a place to see friends, DVDs, cool new books, improving reading, place to connect with friends if you are home schooled (children's group Waubaushene)

**2. What do you agree with / disagree with, in terms of what you have heard in the presentation?**

- Some objected to comparing Tay Township with other communities such as Midland and Penetanguishene<sup>5</sup> that, despite being nearby, are seen to be more urban communities, and not entirely comparable to Tay Township.

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<sup>5</sup> Penetanguishene and Midland were originally part of the benchmark comparisons used in the public meetings. In response to this concern they have been removed from the benchmarked library systems in this Master Plan.

- The Master Plan should reflect the fact that Port McNicoll and Victoria Harbour are donated buildings.
- Families can use the Tay Library card which needs to be respected in comparing with other communities.
- Data shows we are using the libraries which is a message that needs to get out.
- The presentation was just facts and should be respected as facts.
- Presentation could be shorter (children's group Waubauskene)

### 3. What would you like to see in terms of new offerings from the library? (*programs, services, branches, staffing...*)

- Generally, there is interest in all kinds of programs<sup>6</sup> including:
  - Children's programs
  - Teens' programs; there's nothing for teens
  - Adults' programs
  - Programs to help with computers and technology
  - Book clubs
  - Evening programs
  - Art classes
  - Need to keep current with what's going on
  - Year round electronics tutoring
  - Information seminars
- A bookmobile is perceived to be important for those in rural areas and shut-ins
- They would like more open hours, especially at Waubauskene
- More opening during the evenings
- More DVDs
- Up-to-date computers
- Newspapers and current magazines
- More full-time staff (including to improve grant eligibility)
- Coffee
- Flexible loan times
- Better configured community room at Victoria Harbour; more comfortable meeting area
- Better children's area (Victoria Harbour)
- Movies on large screen TV
- Volunteers
- Elevators, ramps for seniors
- Quiet space for studying

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<sup>6</sup> Note that some of these programs are **already offered** by the Tay Township Public Library System. The fact that they were mentioned in this question may reflect a lack of awareness, or the fact that the programs are not offered at a time or location that is convenient to the respondent.

- New computers; faster, better Wifi; snacks and drinks (cookies); phone charger; technology lending; TV; more, newer books; more fun stuff (programs, Pokémon, football); playground; music; art station; child's head sets (children's group Waubaushene)

**4. Is there anything that should be made more efficient or consolidated? (*programs, services, branches*)**

- No consolidation
- Sidewalks cleared
- Bike racks
- Move drop box
- More computer access
- Pay per use copying
- Computer needs to link to schools
- Full time programming person
- More programs for teens
- More programs for youth
- Computer programs for seniors
- More community outreach
- Coffee and tea bar, food service
- Lounge area
- Make one library open at all times
- Better, newer computers (children's group Waubaushene)
- Bigger library (children's group Waubaushene)
- More seating (children's group Waubaushene)

**5. What would be the top priority for change to improve overall service at the Tay Township Public Library? (*each person in the group can mention one thing*)**

- Don't want my library closed – keep the three branch system
- More space
- More computer space
- More access to e-books
- Need better meeting, socializing space at library, especially Waubaushene
- Need to be open Sundays and during evenings
- Waubaushene should not sacrifice library service for the other communities
- Need better accessibility
- Find another place for books on sale
- More hours open

- More school age programming
- Use other township facilities for library programs
- Lounge area for coffee and socializing
- Ukulele lending program
- More use of grants to finance library programs
- Computers, books, more space to do things (children's group Waubaushene)
- More space for better programs (children's group Waubaushene)
- Make it bigger (children's group Waubaushene)
- Longer hours (children's group Waubaushene)
- Volunteer opportunities for kids under 15 (children's group Waubaushene)
- Better job opportunities (children's group Waubaushene)
- Separate area for computers (children's group Waubaushene)
- TV and projector (children's group Waubaushene)

### **8.3 Facilities Review**

The results of the facility review are presented in the form of a SWOT analysis for each of the three facilities. A more detailed discussion of the facilities is presented in Appendix C.

#### **Port McNicoll Branch**

##### **Strengths**

- Largest branch in Township
- Location important to local community who do not have cars
- Two floor facility includes lots of program and storage space on lower level
- Available computer terminals for public use
- Large well-lit work area at the rear
- WiFi / Internet access

##### **Weaknesses**

- No elevator access between floors is a barrier for accessibility
- Poor exterior access to lower level
- Stacks are over capacity for the space
- Very small children's area
- No comfortable reading areas

##### **Opportunities**

- If an elevator and an improved entrance from the parking area were added to building, the library would be able to better utilize both floors for their use without the need of further expansion

### **Threats**

- Security has been an issue at this location
- Facility is underserviced in terms of washrooms on upper floor for a facility of this size
- If made into a fully operational two floor facility, additional staff supervision would be required given the location's security concerns

### **Victoria Harbour Branch**

#### **Strengths**

- Great location, great visibility (near harbour, grocery store, post office and farmer's market)
- Location important to local community who do not have cars
- Space to grow within building
- Most central location within township
- Shared use of adjacent Harbour Shores Community room for Library activities
- WiFi / Internet access

#### **Weaknesses**

- Stacks are over capacity for space
- Limited computer and work space
- No comfortable reading space

#### **Opportunities**

- Local schools merging to location near branch. There will be an increased demand for youth and teen areas
- Potential expansion space with building would help to add program, reading and lounge spaces that would be needed to accommodate increased demand

### **Threats**

- Facility and staff will be overwhelmed with increased demand if size does not increase
- Priority for Community space is given to rentals not library use. This creates a challenge for scheduling regular program offerings

### **Waubushene Branch**

#### **Strengths**

- Location important to local community who do not have cars
- Easy to find
- Bright well-lit space
- Excellent kid's programs
- New sloped roof recently added
- WiFi / Internet access



### **Weaknesses**

- Smallest facility in least populated area
- Limited site does not allow for expansion
- Stacks are over capacity for space
- Small narrow entrance door

### **Opportunities**

- Great kids' programs could attract more visitors if the facility had more space to accommodate them
- With a children's focus, this location would benefit from a children's play area
- Opportunity to move to the former elementary school for additional space

### **Threats**

- Glazed rear door is a security concern

## **8.4 Technology Review**

The technology review is presented in the form of a SWOT assessment.

### **Strengths**

- Good technology infrastructure: wireless network and support, workstations for staff and public users
- Effective Online Public Access Catalogue (OPAC) includes access to physical and electronic collections
- Technology costs are shared with other organizations
- Membership in the Simcoe County Cooperative gives the Library a good Integrated Library System (ILS) at an affordable cost, with access to experienced staff and other services to maintain the ILS and provide technical support
  - Rotations of special collections
  - Electronic books and audio books
  - Access to 14 online databases
  - Hosting of databases of member libraries, etc.
- Shared management and technology services with the Town and County foster a close relationship.

### **Weaknesses**

- No technology plan to tie technology to library service goals
- Limited space and facilities allow little room to process 4,400 new items annually, with resulting backlog at each branch

- Fragmented material processing spread among branches, staff and volunteers leads to inefficient methods to streamline technical processing, resulting in large volumes of work and delay in delivery of new material to patrons
- Inadequate staff resources with retirements and little technical training for replacement staff
- Reliance on volunteers to complete material processing
- Hidden collections: archival material is not accessible in the OPAC, backlog on book carts, overflow in storage area
- Need for additional services

### **Opportunities**

- Library accreditation includes a formal plan to match technology with service goals
- Meet technology goals with partnerships: explore available software, ILS modules or discounts through the Cooperative. Examples: Mobile Circ for offsite and outreach, BLUEcloud Cataloging
- Explore staff training opportunities available with ILS vendor for efficient technical services
- Expose hidden collections to public: add archival material to OPAC with brief cataloguing, discount purchase of software through Cooperative or local group. Storage material can be returned to shelves or weeded
- Continued investment in technology

### **Threats**

- Location and size of Library could limit recruitment of qualified staff
- Demographic change increases demand on library technology
- Some patrons require technology skills
- Technology services become obsolete
- Dependence on other organizations can weaken the Library. Successful cooperation with other groups for technology infrastructure and funding can depend on personality.

## **8.5 Summary SWOT Assessment**

The following summarizes the SWOT assessment including feedback obtained from stakeholders interviewed.

### **Strengths**

- Excellent staff
- Good collection
- Simcoe County Cooperative gives good Inter-library loan service at affordable cost
- Most liked service from Tay's corporate plan and related surveying

- The Library accomplishes a lot with relatively small funds
- Good technology infrastructure
- Shared management and technology infrastructure with Township and County
- Strong support from each local community

### **Weaknesses**

- Uneven distribution of library services – rural areas not well served
- Challenges with computers
- No technology plan to tie in with library service goals
- Limited space in facilities allows little room to process 4400 new items annually
- Inadequate staff resources with retirements and little technical training for replacement staff
- Rural areas remote from branches
- Budgets are generally limited

### **Opportunities**

- Develop a formal technology plan
- Better computers, and IT servicing
- Better programming to meet community needs
- Better or redistributed hours of operation to meet community demands
- Meet technology needs through partnerships
- More use of e-resources?
- Possibly some service consolidation in future?
- Possible community hub in Waubaushene?
- Possible use of grants and other funding sources to help with provision of library services

### **Threats**

- Aging population
- Some drift away from library use / competition from other forms of entertainment / data access
- Possible challenge to operate three branches in longer term
- Location and size of Library could limit recruitment of qualified staff
- Some patrons require technology skills
- Limited resources to meet Library standards

## **9. Assessments of Tay Public Library Using Library Standards and Guidelines**

### **9.1 Facilities Standards and Guidelines**

This section presents a discussion of Tay Public Library's facilities relative to library standards and guidelines.

#### **Ontario Public Library Guidelines**

The Ontario Public Library Guidelines (OPLG) are developed and administered by the Ontario Public Library Guidelines Monitoring and Accreditation. The edition used for this study was the 6<sup>th</sup> edition, amended 2013. The Introduction to the Guidelines states:

*All Ontarians, regardless of where in Ontario they live and work, have a right to public library service that meets basic, widely accepted norms of library practice and service. The Guidelines offer a method for libraries throughout the province to meet basic service levels and to continue to grow to meet the ever-changing needs of their communities. Libraries must conform to provisions of the Public Libraries Act, the Municipal Act, the Accessibility Act and other relevant legislation and are accountable to the communities they serve.*

The Guidelines are voluntary standards accepted by the Ontario public library community, and the Accreditation process provides an opportunity for a public library to measure its services voluntarily to this set of Guidelines.

#### **Guidelines for Rural/Urban Public Library Systems**

The *Guidelines for Rural/Urban Public Library Systems* are developed and administered by the Administrators of Rural and Urban Public Libraries of Ontario (ARUPLO). The edition used for this study is the 2<sup>nd</sup> edition, published in January 2012. The ARUPLO Guidelines are supplementary to the Ontario Public Library Guidelines, above, to address issues of multi-branch and rural library systems in Ontario.

The ARUPLO Guidelines pertain to public library branches within a county library system, in which some staff functions are performed at an administrative office elsewhere, including Interlibrary Loan, materials processing, off-site storage and other administrative functions, thereby reducing some staff and storage space that a standalone library needs to accommodate. In some cases, the ARUPLO Guidelines are the only ones available for some factors and are included in the Ontario Public Library Guidelines.

## **Making the Case for Your Library Building Project**

The third key resource consulted is *Making the Case for Your Library Building Project*, from the Southern Ontario Library Service (2010). This, too, is relevant to Ontario's public libraries.

Fundamentally, communities determine the level of library service they want and need through their library boards and municipal councils. Grants and donations are usually specific and project based. Most funding for core library services and facilities comes from the local municipal tax base. Community guidelines are established through strategic planning and priority setting.

## **Library Catchment Population**

Determining the true catchment population of the library is essential to aligning the Tay Township Public Library with established guidelines for public libraries in Ontario. In order to develop a library service model and determine space needs, it is essential to know the catchment population of the library service area.

According to the Ministry of Sport, Culture and Tourism for the Province of Ontario, the catchment population for a public library is the local municipal population plus the population of municipalities which contract for library service. In the case of Tay Township Public Library, there are no contracts for library service.

For purposes of comparing the branches and population of the Tay Township Public Library to established provincial guidelines, the following table was used and estimates were made from the information in it.

## Tay Township Public Library Service Profile

	Port McNicoll	Victoria Harbour	Waubauskene	TOTAL
Branch size (s.f.)	4,249	1,876	1,657	7,782
Collection	22,777	13,414	12,602	48,793
Hours per week	34	31	22	87
2015 Circulation	24,489	21,644	11,146	57,279
2015 Program Attendance	571	300	675	1,546
2015 Visitors	11,090	12,848	7,065	31,003
Active Cardholders	841	969	430	2,240
Percent of circulation	43%	38%	19%	
Percent of visitors	36%	41%	23%	
Percent of cardholders	38%	43%	19%	
Estimate percent of population served	40%	40%	20%	
<b>Estimate population served</b>	<b>4,400</b>	<b>4,400</b>	<b>2,200</b>	<b>11,000</b>

### Library Guidelines for Facilities

#### Ontario Public Library Guidelines

*“The library board should strive to provide a physical setting for library services that is inviting to the public and that provides adequate space to store and display the library’s physical collection, adequate space for the library staff to carry out their duties in an efficient and comfortable setting, and adequate space for the public to make proper and convenient use of the library’s equipment, resources and services. “*

(Section 3.3 Facilities)

#### Guidelines for Rural/Urban Public Library Systems

There are general, widely-accepted guidelines to assess public library branches, both for current facilities and for future planning. The *Ontario Public Library Guidelines* and the *Guidelines for Rural/Urban Public Library Systems* indicate the following:

Library facilities should be developed to meet local community needs, library service strategies, projected populations and compliance with the Accessibility for Ontarians with Disabilities Act, building standards, other regulations and municipal policies.

The following minimum guidelines are based on assignable library space for staff work areas, programs, services, collections, seating and all required service areas:

**Small branches:** Branches serving catchment areas of 1,000-5,000 population  
Minimum 2,500 sq. ft. or 1 sq. ft. per capita in the library's catchment area, whichever is greater.

**Medium branches:** Branches serving catchment areas of 5,000-10,000 population  
Minimum 5,000 sq. ft. or 1 sq. ft. per capita in the library's catchment area, whichever is greater.

**Large branches:** Branches serving catchment areas of 10,000-35,000 population  
Minimum 10,000 sq. ft. or 1 sq. ft. per capita in the library's catchment area, whichever is greater.

A public library is often constrained in its ability to provide library services to its community by inadequate size. Space for collections, seating, whether lounge-style for individuals or study tables and chairs, computers, programs and activities, along with the ability to meet requirements or guidelines for aisle widths and shelf heights, is all affected by available space.

It should be noted that assignable library space is considered as net square feet, and that a determination of gross square feet (GSF) needs to be considered during a library building project, which is often estimated at 25%.

## **Standards Approach to Library Space Needs**

### **Library Definition**

It is important to define what we are talking about as a library. For the purposes of this study, we are looking at the "bricks and mortar" component of the Tay Township Public Library. Public libraries today, including Tay, also have a "virtual" component of providing online services and resources such as databases and e-books.

The ARUPLO Guidelines considers only catchment populations and does not distinguish between types of branches or service levels.

*Small Branches: Branches serving from 1,000-5,000 population*

*Medium Branches: Branches serving from 5,000-10,000 population*

*Large Branches: Branches serving from 10,000-35,000 population*

The *Ontario Public Library Guidelines* (OPLG) is summarized as follows:

*Each library system must determine the service level, which is the nature of the service, which will be offered to the public, whether the library has one branch or 33. Where there are several*

*branch libraries, the hours and services offered in each of these branch libraries should be based on the needs and characteristics of the local community it is meant to serve.*

## **Service Levels and Standards**

The Ontario Public Library Guidelines uses both the ARUPLO Guidelines for size recommendation as well as the following Standards Table in the document, *Making the Case for your Library Building Project*, by the Southern Ontario Library Service.

### **Service Levels**

*The per capita standard provides an average square foot (square meter) per capita for a library building based on three levels of service – basic, enhanced and comprehensive.*

#### **Basic Service**

*A library building that houses the minimum staff, collections and technology to meet the basic library needs of its service population. Note: This service level applies to any deposit branch and some neighbourhood branches of a multi-branch system.*

#### **Enhanced Service**

*A library building that meets the basic standard and includes administrative or technical services plus a modest range of additional public services and programs for the people in its designated service area. Note: This service level applies to neighbourhood and regional branches and may apply to stand-alone buildings.*

#### **Comprehensive Service**

*A library building that meets the enhanced standard and includes space for a broad range of public services and programs for people in its designated service area. Note: This service level applies to neighbourhood and regional branches and stand-alone buildings.*



Standards Table (Minimum Square Footage & Square Feet/ Metres Per Capita) Measurements in this table refer to a building's gross square footage			
Service population of library building under review	Level of Service		
	Basic	Enhanced	Comprehensive
Buildings serving under 1,000 people use minimum square footage <b>OR</b> square feet per capita <u>whichever is greater</u>	2,500 sq. ft. (232 sq. m.) <b>minimum</b>	3,125 sq. ft. (290 sq. m.) <b>minimum</b>	3,900 sq. ft. (362 sq. m.) <b>minimum</b>
	2.50 sq. ft. (0.232 sq. m.) <b>per capita</b>	3.25 sq. ft. (0.302 sq. m.) <b>per capita</b>	4.00 sq. ft. (0.372 sq. m.) <b>per capita</b>
Buildings serving 1,001 – 2,500 people use minimum square footage <b>OR</b> square feet per capita <u>whichever is greater</u>	3,280 sq. ft. (305 sq. m.) <b>minimum</b>	4,100 sq. ft. (381 sq. m.) <b>minimum</b>	5,125 sq. ft. (476 sq. m.) <b>minimum</b>
	1.60 sq. ft. (0.149 sq. m.) <b>per capita</b>	2.00 sq. ft. (0.186 sq. m.) <b>per capita</b>	2.50 sq. Ft. (0.232 sq. m.) <b>per capita</b>
Buildings serving 2,501 – 5,000 people use minimum square footage <b>OR</b> square feet per capita <u>whichever is greater</u>	5,000 sq. ft. (465 sq. m.) <b>minimum</b>	6,350 sq. ft. (590 sq. m.) <b>minimum</b>	7,815 sq. ft. (726 sq. m.) <b>minimum</b>
	1.30 sq. ft. (0.121 sq. m.) <b>per capita</b>	1.62 sq. ft. (0.151 sq. m.) <b>per capita</b>	2.00 sq. ft. (0.186 sq. m.) <b>per capita</b>
Buildings serving 5,001 – 15,000 people use minimum square footage <b>OR</b> square feet per capita <u>whichever is greater</u>	8,100 sq. ft. (753 sq. m.) <b>minimum</b>	10,125 sq. ft. (941 sq. m.) <b>minimum</b>	12,650 sq. ft. (1,175 sq. m.) <b>minimum</b>
	1.05 sq. ft. (0.098 sq. m.) <b>per capita</b>	1.31 sq. ft. (0.122 sq. m.) <b>per capita</b>	1.64 sq. ft. (0.152 sq. m.) <b>per capita</b>

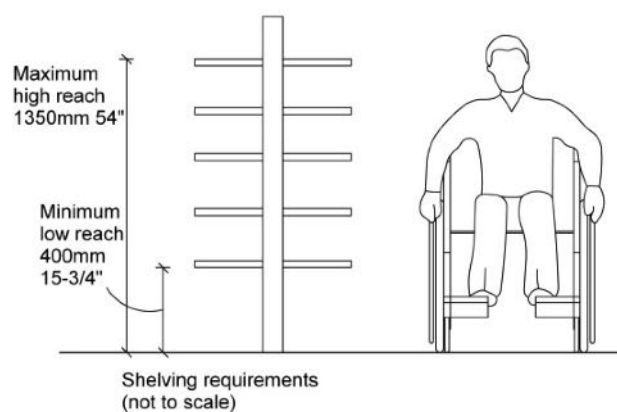
For purposes of this exercise, we will consider Port McNicoll and Victoria Harbour requiring an enhanced level of service as some technical and administrative services are provided at those branches and that Waubaushene requires a basic level of service as defined above. It should also be noted that some administrative services such as financial and the CEO's office are located municipal building.

Community	Estimated Population Served	Current Size (s.f.)	ARUPLO Guidelines (s.f.)	Standards Table (s.f.)
Port McNicoll	4,400	4,249	4,400	7,128
Victoria Harbour	4,400	1,876	4,400	7,128
Waubauskene	2,200	1,657	2,500	3,520

## Other Factors Affecting Space Needs

### Facility Accessibility Design Standards (FADS) and the Library Collection

Since the above guidelines and standards were published, the Ontario Building Code has been revised to require larger accessible washroom. In addition, many municipalities have adopted the Facility Accessibility Design Standards (FADS) which have a significant impact on public libraries.



In addition to access to the building and the provision of accessible workstations and furniture, clear aisle space and the height of book shelves are important elements of an accessible public library. This results in a larger space requirement for the collection. It also has the benefit of making the library more attractive and open and easier to supervise.

### Collection Size and Type

In addition to a significant reduction in shelf height as required for accessibility, collection size is a large factor in space requirement. Many libraries are reducing their physical collection sizes, in particular reference books, as online resources replace these to a significant extent. However, other trends towards merchandising and displaying materials attractively consume space as well.

<b>Community</b>	<b>Estimated Population Served</b>	<b>Current Collection Size</b>	<b>ARUPLO Guidelines</b>
Port McNicoll	4,400	22,777	13,200 – 22,000
Victoria Harbour	4,400	13,414	13,200 – 22,000
Waubashene	2,200	12,602	7,500 – 11,000

The ARUPLO Guidelines also indicate that materials should be shared among branches. This is done at Tay with rotations to refresh the browsing collections and rotations of pool materials from the Simcoe County Library Co-operative.

For purposes of discussion, the scenario of a single standalone library would look like this for space requirements.

<b>Community</b>	<b>Estimated Population Served</b>	<b>Current Size (s.f.)</b>	<b>ARUPLO Guidelines (s.f.)</b>	<b>Standards Table (s.f.)</b>
Tay Township	11,000	7,782	11,000	14,410

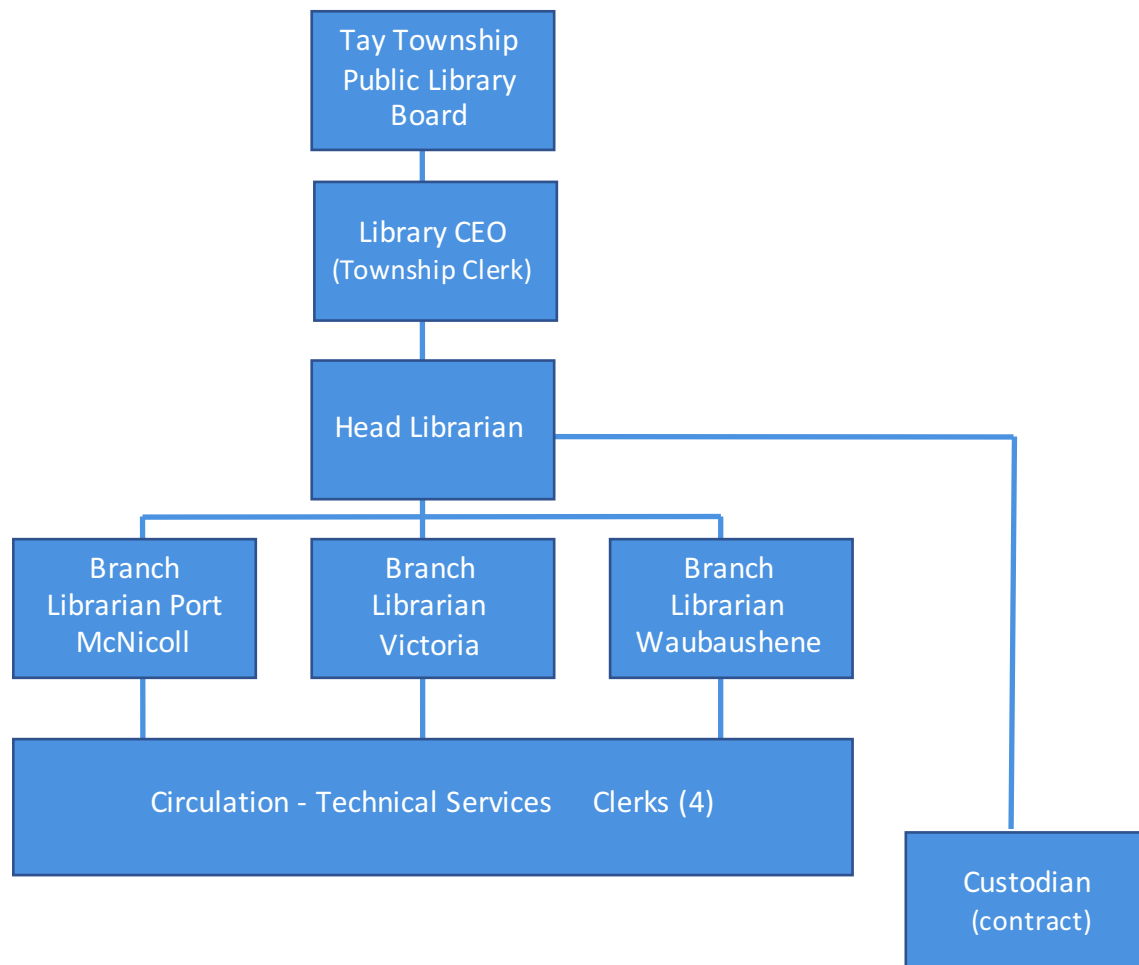
This information was used to assess the capital cost implications of building a new centralized library facility as distinct from major upgrading of each of the three branches (subsequently discussed).

## 9.2 Staffing and Guidelines

This section presents an assessment of Tay Public Library's staffing resources relative to library guidelines.

### Current Organization and Staffing

The current organization structure is shown below:



The Library Board is composed of three at-large members and two Council representatives.

The Library CEO is also the Clerk of the Township, which is not the usual situation – most public libraries (90%) have a full time CEO. It is estimated that she spends from 20% to 30% of her time on Library matters. However, the cost associated with this time is not included in the Library budget.

All other staff including the Head Librarian are part-time.

Time allocations of Library staff are as follows:

- Library CEO is 20 – 30 % FTE, with a dual reporting relationship to the Library Board and Municipal Staff
- Head Librarian 28 hrs./week
- Branch Librarian (3) 24 hrs./week
- Circulation/Technical Services Clerk (4) various part-time hours

## **Tay Staff Resources in Comparison with Library Guidelines**

### **Ontario Public Library Guidelines**

#### **Section 3.1 Staff Resources**

*In the interests of providing the best service possible to its community, the library board and administration should strive to maintain staff who is well trained and technologically literate to meet library needs, highly motivated and sufficient in number to meet the demands of the community.*

##### **3.1.7 Level of Training of the CEO**

*The CEO has completed formal library education which is appropriate both to the needs of the community and to the complexity of the library operation.*

*Recognized Levels of Training*

1. ALA accredited graduate degree
2. College Diploma in Library Techniques
3. Excel Certification

##### **3.1.8 Continuing education and training**

*The library encourages continuing education and training for its staff and makes provision for this in its policy, its long-range plan, and in its budget to an amount not less than 1% of its total wages and benefits.*

The ARUPLO Guidelines supplement the above Ontario Public Library Guidelines.

### **3.3.5 Staff**

*With increasing public expectations, technology-based services and operations, and the fundamental change in library services, all library employees require formal library education and training. The following guidelines indicate both the minimum number of*

*staff and their professional qualifications. Other desirable approaches to staffing are described as best practices in section 4.*

*These guidelines are based on the organizational, communication and operational challenges of staffing a multi-branch system and ensuring a professional team is in place to deliver and manage all functional requirements of a full library system.*

**Definitions:**

- *Professional librarians are defined as having a Master's degree in library or information science from an accredited university.*
- *Library technicians are defined as having a diploma in library techniques from a community college.*
- *The EXCEL Certificate Program in Small Library Management is a distance education program for library workers without formal library training and is administered by the Southern Ontario Library Service.*
- *FTE = Full-time equivalent.*

*Each library system has professional librarians that are used on a system-wide basis. The Library Administrator for each system is a professional librarian. One third of all system-wide staff are professional librarians; For every 10,000 people or part thereof, one of the full-time equivalent staff is a qualified librarian.*

*In addition to minimum staff levels indicated in the guidelines, staffing should correspond to workload. The demands of library service transactions per staff hours can be used as a guide, with 13 transactions per staff hour providing adequate time to deal with circulation and reference work.*

- *Small Branches: Branches serving catchment areas of 1,000 – 5,000 population  
Post-secondary and/or library training  
Excel and/or Library Technician training  
1 - 2.5 FTEs (includes administration, system functions and service delivery)*
- *Medium Branches: Branches serving catchment areas of 5,000-10,000 population  
Branch Supervisor: Professional librarian or post-secondary and library training  
Branch Assistant: Excel and/or Library Technician training  
2.5 – 5 FTEs*

ARUPLO's best practice for staff training is 2.5% of the staff budget.

## Comments and Observations

1. It is essential that all library employees be well trained to support the library community in using the technology that is required to access the electronic resources provided by the library. For example, library staff need to teach and assist library users how to access and use the downloadable audiobooks, e-books, and reference resources that are provided by the library, show them how to use the library computers and connect to the wifi from their own devices, and help them to download apps and the resources onto their own tablets and devices. This is an ever-changing environment which requires nimble, flexible staff engaged in a learning environment.
2. The continuing and emerging role of public libraries as community hubs requires library employees to have competencies to deliver programs and services appropriate to the community needs and engage the community both within the library and out in the community
3. While training is also provided by the Simcoe County Library Co-operative, the library budget of \$600 is far short of the 1% - 2.5% of the staff budget recommended by the Guidelines. (\$2,700 - \$6,900). The reason that ARUPLO has a higher training cost is that many employees in rural libraries are part-time, as in the case of Tay, and training applies to individuals, not full-time equivalents. There are many learning opportunities to assist library employees to gain and keep the skills required for their positions, including the Ontario Library Association Superconference, courses and webinars provided by the Southern Ontario Library Service, and local opportunities to help develop community networks and learn what synergies can be achieved through the library.
4. The use of the title “librarian” for employees at the Tay Township Public Library is misleading as none of the current job descriptions, including the job description of the CEO, requires a professional librarian degree.
5. The hours of operation affect the type of staffing required. For example, the short shifts and closing for meal breaks at Tay are less customer focused than longer opening hours, which can be accommodated with overlapping staff shifts. Likewise, a mix of morning hours and evening hours can help meet the needs of the community. The hours of operation should meet the community needs, not the employee preferences.
6. All public service library staff (with the exception of students) should have a minimum of the Excel Program in Small Library Management. As a transition, current staff should be supported in taking the program. Employees who already have a diploma in library techniques or a degree in library science do not need to take the Excel Program in Small Library Management. Library employees who do not participate in public service duties (if there are any), need library training appropriate to their duties. It would be desirable for Tay that all employees be cross trained to ensure that they are able to serve the public.

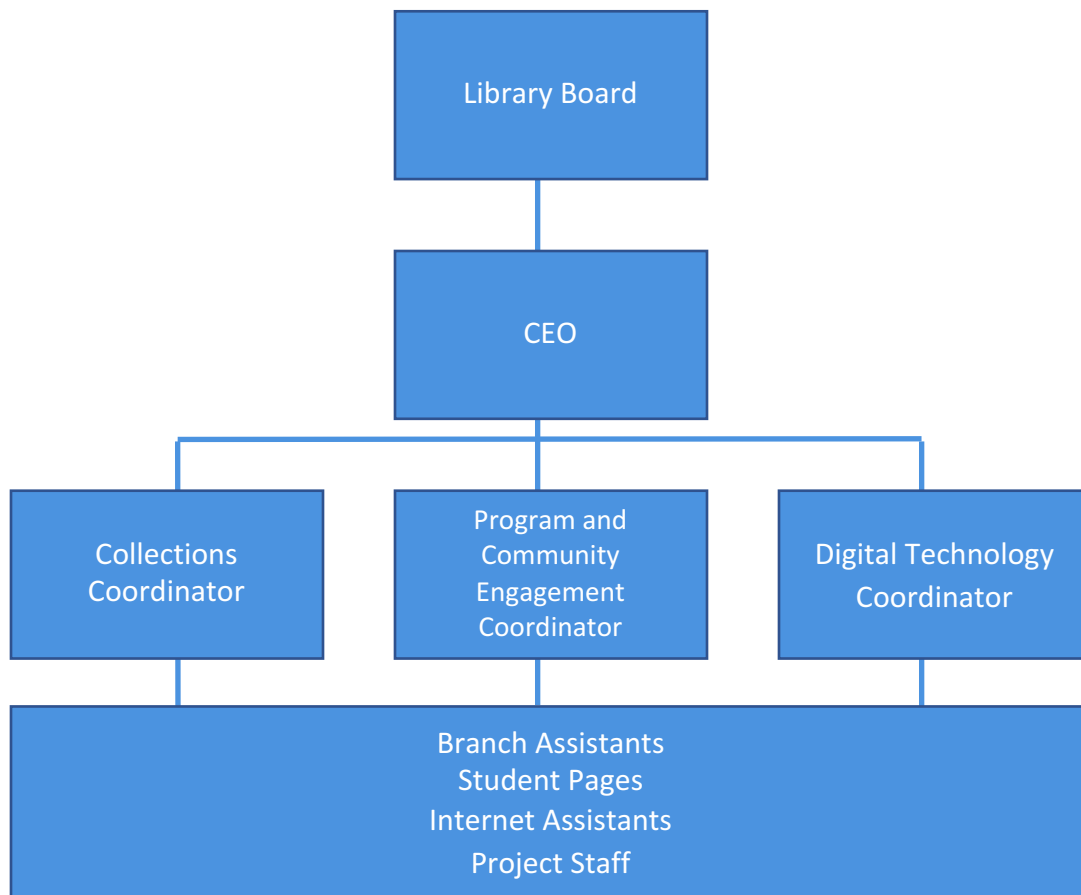
7. Technical and cataloguing activities can be outsourced to the suppliers for a reasonable cost; library staff can engage in the local library and community programming. Many other libraries in Simcoe County Library Co-operative purchase shelf-ready materials and Tay is a member of the Library Service Centre which does free assessments.
8. The reporting relationship for the CEO can be problematic, when the position is split part-time to the library board and part-time to municipal staff. It is good to have close connections with the municipal staff and council, which can be done with the CEO effectively part of the senior management team of the municipality.
9. Whatever the branch configuration, the staff complement should be flexible to work in most positions and all branches.
10. Two possible organization charts are shown on the following pages. In contrast to the current system which is primarily oriented to the branches, Option A places primary emphasis on key library functions (collections, programs, digital technology), with the branch coordination orientation being secondary. The advantage of the functional orientation is that it provides greater clarity, responsibility and accountability for these functions. A second organization chart, Option B, is presented as a transition model between the current organization and the proposed functional model



A proposed future organization chart is show below:

## **Tay Township Public Library Organization Structure**

Option A. Functional Alignment<sup>7</sup>



Ontario public libraries have increasingly been moving to more of a functional orientation. Assuming Tay Public Library evolves its organization to a functional model, following would be key tasks associated with the above positions:

### **Collections Coordinator**

- selects all materials, physical or virtual, for the collection for the Tay Township Public Library, including ordering new materials to meet community needs, monitoring requests to determine whether to acquire new materials or request on interlibrary loan;

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<sup>7</sup> Note that the contracted 'Custodian position, which is in the process of transferring to report directly to the Municipality, is not shown in this or the next diagram.

- deselects materials (weeds the collection) to ensure that collection space available is used for popular circulating items;
- assesses offered or donated materials for need to acquire for collection and disposes of unneeded materials in a timely and efficient fashion.

#### **Program and Community Engagement Coordinator**

- engages community partners (schools, social service, recreation, and municipal agencies, etc.) to create awareness of the library's community and innovative programs;
- develops and delivers programs to meet the community's needs;
- actively develops community relationships to enhance the library's profile.

#### **Digital Technology Coordinator**

- leads the development of virtual library services and drives technological innovation to promote digital literacy to the community, including ensuring that library visitors and patrons have the training to use the digital services available through the library, including downloadable resources, e-resources within the library, both on the library computers and the library users' own devices;
- in co-operation with the Township IT service, manages IT infrastructure that supports the Library's operations.

The following should also be considered in moving to a new model:

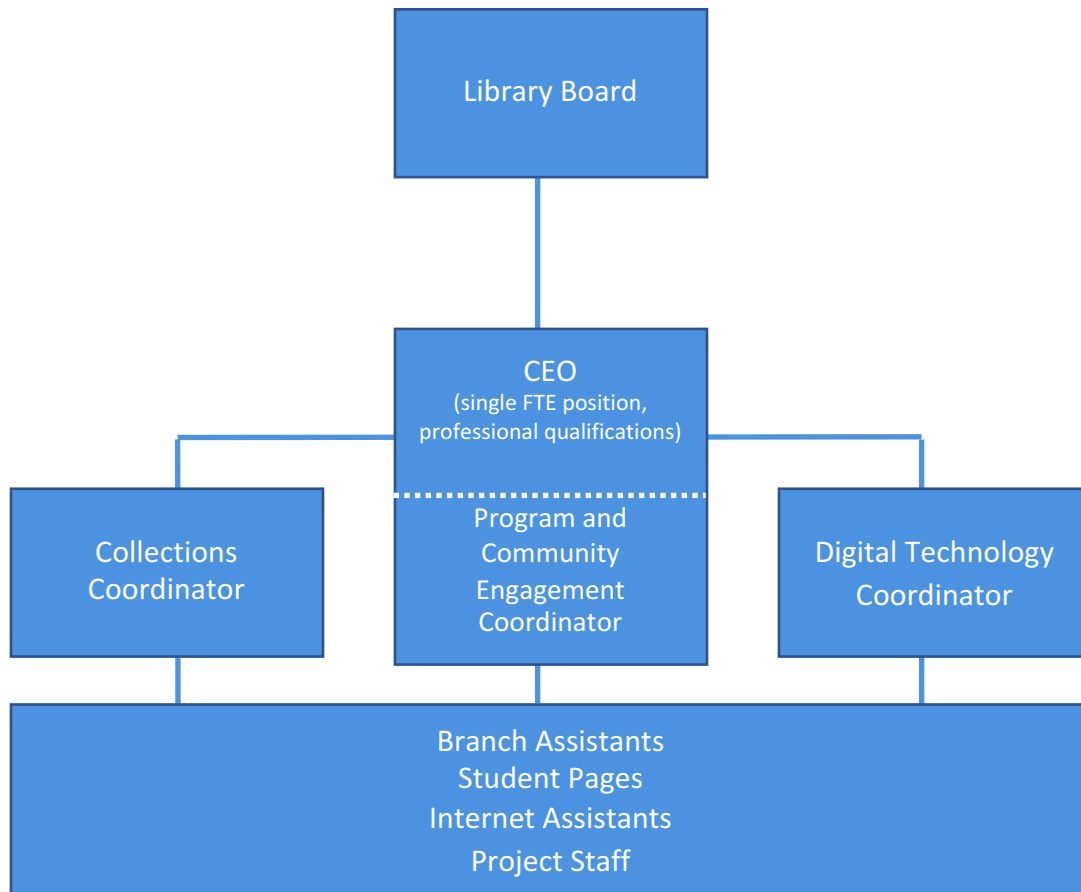
#### **Transition Plan**

1. Ensure that current employees are offered training to develop into the new model;
2. Work toward a model with fewer employees working longer hours for better return on investment in training and better employee satisfaction;
3. Use retirement/attrition opportunities to hire new employees with training, competencies, and skills needed.

A transition model for the future organization chart is show below:

## **Tay Township Public Library Organization Structure**

Option B. Transitional Model with Functional Alignment



## **10. Directions Emerging from Board / Steering Committee Workshop**

### **10.1 Workshop Background and Purpose**

A Steering Committee was formed to advise the consulting team. The team had an initial meeting with the Steering Committee October 6<sup>th</sup> followed by a planning workshop on November 8<sup>th</sup> to discuss and analyze a number of strategic options concerning the future of the Library. The second workshop included all members of the Library Board. Prior to the workshop, the Steering Committee was presented with a workshop package that included

extensive analytical materials related to the current Library systems as well as future possible service configurations. Using these workshop materials, the Steering Committee was able to provide direction to the consultants regarding the future preferred service option, including branch configuration, hours of operation, staffing and enhanced service delivery options<sup>8</sup>.

## 10.2 Library Service Configurations Evaluated

The following were the main library service configurations evaluated by the workshop participants:

### High-Level Inventory of Scenarios

Basic Direction	Specific Scenario	Description
<b>A) Maintain the Three Branches</b>	1) Status Quo – maintain system as is	- No physical change to any branches
	2) Refurbishment to Improve Functionality and Accessibility in the Three Branches	- W: refreshment of interior space (painting, some internal re-arrangement, etc.), access upgrade - VH: Interior refreshment - PM: refresh ground floor; reinstate decommissioned washroom; create new basement entrance, access upgrade
	3a) Expand VH only; accessibility upgrades to W and PM	- VH: Interior renovation; expansion into adjacent spaces plus addition to meet standard - W: access upgrade - PM: access upgrade
	3b) Expand W only; leave VH and accessibility upgrade to PM	- W: relocation and renovate or build to standards - VH: leave as is - PM: access upgrade
	3c) Expand PM only; accessibility upgrades to PM and W	- PM: ground floor and basement renovation; reinstate decommissioned washroom; new elevator; new entrance enclosure, access upgrade - W: access upgrade - VH: leave as is
	3d) Expand each of the 3 branches to meet ARUPLO standards and accessibility upgrades	- W: relocation and build to standards - VH: Interior renovation; expansion into adjacent spaces, addition to meet standard - PM: ground floor and basement renovation; reinstate decommissioned washroom; new elevator; new entrance enclosure, access upgrade, addition to standard
<b>B) Complete or Partial Consolidation</b>	4a) Close W; Consolidate operations into remaining two branches expanded to standard	- W: close - VH: Interior renovation; expansion into adjacent spaces, addition to standard - PM: refresh ground floor; reinstate decommissioned washroom; create new basement entrance, access upgrade, expand to standard
	4b) Close VH; Consolidate operations into	- VH: close

<sup>8</sup> The workshop materials are presented in different sections of this report.

	remaining two branches expanded to standard	<ul style="list-style-type: none"> <li>- PM: refresh ground floor; reinstate decommissioned washroom; create new basement entrance, expand to standard</li> <li>- W: relocation and build to standards</li> </ul>
	4c) Close PM; Consolidate operations into remaining two branches expanded to standard	<ul style="list-style-type: none"> <li>- PM: close</li> <li>- VH: Interior renovation; expansion into adjacent spaces, addition to standard</li> <li>- W: relocation and build to standards, access upgrade</li> </ul>
	5) Create new facility in one of the communities through retrofit of existing building	<ul style="list-style-type: none"> <li>- Close all three branches</li> <li>- Create facility of 13,200 sq. ft. (to meet overall community ARUPLO standards) in existing structure somewhere within municipality</li> </ul>
	6) Build new central library facility	<ul style="list-style-type: none"> <li>- Close all three branches</li> <li>- Build new facility of 13,200 sq. ft. (to meet overall community ARUPLO standards) somewhere in municipality</li> </ul>
<b>C) Service Agreements</b>	7) Close all branches; establish service agreements with surrounding municipalities	<ul style="list-style-type: none"> <li>- Close all three branches</li> <li>- No new facilities built</li> <li>- Establish service agreements with surrounding municipalities to provide library services</li> </ul>

Notes: PM – Port McNicoll; VH – Victoria Harbour; W - Waubaushene

The Steering Committee participants used a number of criteria and a scoring system to rank the various scenarios. The evaluation criteria are shown below:

<b>Proposed Evaluation Criterion</b>	<b>Info in the Data Package the will help inform evaluation</b>
a) Additional operating costs (over current system)	Operational Improvements and Costs
b) Capital costs for refurbishment or new construction	Architectural Considerations and Costs; Facilities SWOT
c) Impact on community integrity (sense of place, feeling of connectedness, etc.)	Community Survey; themes from the interviews; summary SWOT
d) Accessibility / affordability by all members of the community	Community Survey; themes from the interviews; summary SWOT
e) Impact on overall Tay brand and identity	Community Survey; themes from the interviews; summary SWOT
f) Increase in service delivery to community (adhering to modern standards of library service)	Community Survey; themes from the interviews; summary SWOT

Following the ranking of the various service options, the participants engaged in further discussion to come up with their preferred future service option(s).

### 10.3 Enhanced Services Evaluated

Following the discussion of the preferred branch configuration, the participants also reviewed a number of possible “overlays and enhanced service options” which covered possible

improvements to library services including service agreements, services to shut-ins, hours of operation, technology, enhanced programming and staffing. These are shown below.

### Overlays and Enhanced Service Matrix and Costs

	Basic	Enhanced	Comprehensive
<b><i>Service Agreements</i></b>	None	With Springwater (Elmvale) only	With Springwater and Midland
<b><i>Deliveries to Shut-Ins</i></b>	Current level of service continues	Double existing Activity	Triple existing Activity
<b><i>Hours of Operation</i></b>	No increase above current levels	Add branch-hours to enable Friday evening at one branch, and Sunday opening at one branch (exact location(s) to be determined)	Add branch-hours to enable Friday evening at two branches, and Sunday opening at two branches (exact location(s) to be determined)
<b><i>Technology</i></b>	Current technology budget continues (approx. \$6,000 per year on average for equipment and software)	Technology budget increased by 50% (\$3,000) to enable: - SirsiDynix licence - 1 new tablet per branch	Technology budget increased by \$10,000 to enable: - SirsiDynix licence - OPAC chat training service - 2 new tablets per branch
<b><i>Enhanced programs</i></b>	None	Additional programming offered through hiring temporary staff to deliver programs requested by the community	As in 'Enhanced' level, but to a greater degree
<b><i>Enhanced staffing</i></b>	No change to existing staffing levels	Increase staffing by one part-time position at each branch	Establish Head Librarian position as well as increased staffing in the branches (as per 'Enhanced' scenario)

## 10.4 Synopsis of Workshop Results

The decisions which emerged from the workshop and which form the basis of the recommendations are outlined below.

### 1) Physical Configuration:

- Option 2 in the short term, but ultimately moving to Option 3d in the longer term (10-20 year horizon)
- First priorities for physical expansion work would be a refurbished Port McNicoll and Waubaushene particularly in order to meet accessibility requirements. Victoria Harbour similarly would receive a refurbishment.

## **2) Service Agreements:**

- Test option of simply reimbursing households who wish to sign up for Elmvale access (which possibly does not require a service agreement at all)
- For comparison, explore feasibility of service agreements with Springwater (Elmvale branch) in the short term, Midland in the longer term if Elmvale works out

## **3) Hours of Operation**

- Move toward consistent hours of operation in all branches acknowledging that W has fewer hours, eliminating the 1-hour lunch break
- A variation of this to consider is different close days
- Explore feasibility of Sunday hours in summer using summer staff
- Accomplish the above by redeploying existing hours of operation where possible - only add more hours if absolutely necessary to achieve above
- Hours of operation (and related staffing) is a priority among system enhancements

## **4) Enhanced Service to Shut-Ins**

- Implement this service as soon as possible, but monitor costs on an ongoing basis

## **5) Technology**

- No increase in budget, no need to do anything new other than replace computer terminals in library
- Costs / benefits of purchasing shelf-ready books needs to be investigated

## **6) Programs: (will be dependent upon staffing resources)**

- Find ways to encourage community engagement including use of volunteers in developing programs

## **7) Staffing**

- 2 FT positions were discussed: one a CEO/Head librarian position when the Head Librarian retires in a year or so; a second to do programming, community outreach and other activities. Each should have appropriate library credentials and experience.
- in medium to longer term, reconfigure 'Branch Manager' positions so that they have more of a functional responsibility system-wide (e.g. Collections Coordinator', 'Programs and Community Outreach Coordinator', Digital Technology Coordinator") and less of a strict branch alignment - while each would be located in one 'home branch' and would look after basic coordination there, they would also rotate throughout the system to some extent (e.g. 1-2 days a week)

## Part C. Recommendations and Implementation

### 11. Priority and Sequencing of Recommendations

The table below outlines the implementation plan for the recommendations contained in this strategy. For each, the priority of the recommendation is indicated, as is the suggested timeframe in which it should take place.

The definitions used in this implementation plan can be interpreted as follows:

#### ***Priority***

- |                |                                                                                                                                                                                                                                                                                                                              |
|----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>High:</b>   | A must-do: implementing this recommendation should have first call on time and financial resources devoted to implementing the plan, and should be considered essential to initiate and complete. They may be on the 'critical path' to achieving other strategic goals.                                                     |
| <b>Medium:</b> | After the high priority recommendations have been dealt with, medium priority actions should next be undertaken. They have, in a sense, 'second call' on available resources.                                                                                                                                                |
| <b>Low:</b>    | If high and medium priorities are underway, and there is still some energy, time and financial resources left over, then low priority initiatives should be tackled. However, if they are not implemented, the fundamental plan is not in jeopardy. Low priority initiatives are considered 'desirable' but not 'essential'. |

#### ***Recommended Timeframe***

A five to ten-year timeframe is recommended for the implementation of the recommendations outlined here. This is broken down into the specific time periods described below:

A 10 to 20-year timeframe is recommended for the implementation of the recommendations outlined here. This is broken down into the specific time periods described below:

- |                    |                                                                                                                                           |
|--------------------|-------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Immediate:</b>  | <b>'within the next two years'</b> - Initiative should start as soon as possible in 2017 or 2018                                          |
| <b>Short-Term:</b> | <b>'within the next five years'</b> - Initiative should be undertaken at some point over the 2019 to 2021 period and carry on as required |



**Medium-Term:** ‘within 5 to 10 years’ - Initiative should be undertaken over the 2022 to 2027 period and carry on as required

**Long-Term:** ‘10 to 20 plus years out’- Initiative will commence post 2027 and beyond

## 12. Facility Improvements

**Recommendation 1. Maintain Existing Three-Branch System Over the Next Decade:** The overwhelming consensus from the community, as well as the Workshop Group struck for this project (which included all Library Board members as well as the Steering Committee), was to retain and improve the existing three-branch system. It was felt that having a library branch in a community was an integral component of the sense of integrity and well-being of those living there, and that it would be entirely unacceptable to consider closure of a branch or consolidation into fewer branches. As well, in addition to the strong community response against amalgamation or consolidation of the library branches, the current metrics of library usage in Tay Township do not support any movement towards significant consolidation or change that would entail major capital cost. (These metrics include library membership percentage; per capita circulation statistics; program use; etc., all of which are lower than comparable communities.) Accordingly, this recommendation is for the Library Board and ultimately Council, to endorse and approve the overall direction to maintain the current configuration of the three-branch system over the next decade.

**Timeframe:** *Immediate*

**Priority:** *High*

**Recommendation 2. Undertake Urgent Repairs and Basic Upgrade to Waubaushene Branch:** Recognizing that the long-term intention is to relocate the Waubaushene branch into a larger facility in the medium-term, it is recommended that minor improvements to the Waubaushene branch be carried out at this time. The improvements suggested are to replace the back door with a more secure one, and refresh the interior with a new coat of paint and carpet. The cost would be as follows.

1,657 sf    \$50 / sf finish refresh estimate	= \$82,850
New secure back door	= \$15,000
<b>Short Term net estimate</b>	<b>= \$97,850</b>
20% contingency	= \$19,570
<b>Short Term Total Estimate</b>	<b>= \$117,420</b>

**Timeframe:** *Immediate*

**Priority:** *High*

**Recommendation 3. Undertake Interim Expansion to Victoria Harbour Branch:** A ‘interim expansion’ to the Victoria Harbour branch is recommended in the short-term. This would entail the branch expanding into the adjacent Harbour Shores Room, and fitting this space up for shelf space with books, tables and some programming area. The entrance into the newly-expanded library branch would need to be reconfigured.

In addition, a refreshment of the existing space is recommended. The ‘finish upgrade’ elements would entail new painting, some new furnishing, aisle re-alignment to improve flow, etc. The cost of such short-term improvements is approximately \$276,000, calculated as:

<b>(A) Refreshment of Existing Space</b>		
1,876 sf	\$50 / sf finish refresh estimate	= \$93,800
20% contingency		= \$18,760
<b>(A) Existing Space Refresh Estimate</b>		<b>= \$112,560</b>
<b>(B) Expansion into Harbour Shores Room</b>		
788 sf	.....\$150 / sf finish refresh estimate	= \$118,200
15% FF&E allowance		= \$17,730
Short Term net estimate		= \$135,930
20% contingency		= \$27,186
<b>(B) Harbour Shores Room estimate</b>		<b>= \$163,116</b>
<b>(A+B) Short Term Total Estimate</b>		<b>= \$275,676</b>

Note: the above estimate assumes that an entranceway or visible window can be created between the existing space and the Harbour Shores room without the addition of load-bearing reinforcement.

**Timeframe:** Immediate

**Priority:** High

**Recommendation 4. Undertake Upgrade and Accessibility Improvements to Port McNicoll Branch:** Various medium-term improvements to the Port McNicoll branch are recommended, to provide a finish upgrade as well as accessibility improvements including a 700 sf increase in space to accommodate an elevator. The cost of these improvements is estimated is approximately \$893,000, and is comprised of the following:

700 sf Addition	\$350 / sf addition estimate	= \$245,000
15% FF+E allowance for addition		=\$36,750
Basement furniture allowance		=\$75,000
Elevator Allowance		=\$100,000
Washroom and Power Operator upgrade		=\$75,000
4,249 sf	\$50 / sf finish refresh estimate	=\$212,450
Short Term net estimate		= \$744,200
20% contingency		= \$148,840
<b>Short Term Total Estimate</b>		<b>= \$893,040</b>

***Timeframe: Medium-Term***

***Priority: High***

**Recommendation 5. Food Service in the Branches is Not Recommended at this Time:** A frequent desire heard in both the community survey as well as the meetings was to have coffee and tea available, and maybe a limited a range of food items, in the branches. This is **not** recommended at this time, for several reasons: the lack of space to have food available; the lack of proper kitchen utilities; and the resulting risk of garbage and mess (and worse). Unfortunately, in the view of the consultants, this is a desire that is not possible to accommodate in the present circumstances. However, in the longer term, if and when expanded space is contemplated, having food service options is a direction that should be actively considered.

***Timeframe: Immediate***

***Priority: Medium***

**Recommendation 6. Library Branches should have a goal of meeting ARUPLO Space Guidelines in the Longer-Term:** None of the improvements suggested in Recommendations 2, 3 and 4 actually result in enough space to meet ARUPLO guidelines. For the longer-term, it is recommended that the Tay Township Public Library system express an intent to adopt ARUPLO space guidelines after the next decade, once the metrics of library usage as discussed in Recommendation #1 have been increased. This would entail a major capital cost.

In terms of major renovation and expansion to the existing three branches, the required longer-term improvements in order to meet ARUPLO standards amount to just over \$4 million. (Appendix C outlines these improvements in detail.) These costs are shown in the following table.

Branch	Recommended Improvements	Cost (rounded)
Victoria Harbour	- Expand from 2,664 to 5,500 sf to meet guidelines	\$1,463,000 <sup>(1)</sup> - \$3,257,000 <sup>(2)</sup>
Waubashene ( <i>relocation to another site within community</i> )	- Expand from 1,657 to 3,125 sf to meet guidelines	\$647,000
Port McNicoll ( <i>expansion on-site</i> )	- Expand from 4,249 to 5,500 sf to meet guidelines	\$266,000 <sup>(3)</sup>
<b>Total Longer-Term Cost (in \$2016)</b>		<b>\$2,376,000 - \$4,170,000</b>

Note: (1) This option expands to fill the existing facility, keeps the Post Office and requires a new addition of 2076 sf assuming the site will allow it. It assumes Recommendation 3 has been undertaken.

(2) This is the 'purpose built' long term option.

(3) These costs assume Recommendation 4 has been undertaken.

**Timeframe:** Long-term

**Priority:** High

## 13. Accreditation

**Recommendation 7. Seek Accreditation of the Library System within 5 Years:** Accreditation is a voluntary step for a library system but does signal to staff, the municipality and the wider community an intention to operate at the highest level of excellence possible. It is recommended that over the short-term (i.e. the next 5 years) the library system strive to attain accreditation through the Ontario Public Library Guidelines and Accreditation Council (see: <http://www.ontariopubliclibraryguidelines.ca>). As a good first step for accreditation, it is recommended that an explicit Memorandum of Understanding (MOU) between the Library Board and the municipality be established. It is suggested that the development of this MOU take place in the 'immediate' time period (i.e. over the next 2 years) and act as a foundational document for the accreditation process. As well, this MOU should reflect the strategic directions outlined in this Master Plan.

One aspect of library operations that should be clarified in this MOU is the current relationship between the Municipal Clerk position and that of the Library CEO. While this will likely change at some point over the Short-Term period (see Recommendation #15) it would nonetheless be useful to spell out the current situation explicitly. In particular, that portion of the salary and benefits of this current position that should be transferred to the Library budget should be identified for clarity and transparency, and to facilitate future budget planning.

Seeking accreditation using the Ontario Public Library Guidelines gives the Library Board and

staff a development tool to improve policies, resources, and services.

**Timeframe:** *MOU should be developed in the 'Immediate' time frame (i.e. next 2 years). Shortly thereafter (in the Short-Term) accreditation should be achieved.*

**Priority:** *High*

## 14. Use of Neighbouring Library Systems

**Recommendation 8. Explore the Feasibility of Reimbursement for Memberships in Neighbouring Library Systems, or Service Agreements:** One means of increasing service to the entire community is to simply reimburse those who choose to purchase a library membership in a more convenient neighbouring municipality on their own (in areas where a public library from another municipality may be in closer proximity than a Tay branch). As an alternative, the library should explore as well the feasibility of enabling service agreements with neighbouring municipalities, especially for those living in rural areas to the south, and possibly with Midland to the west. (This would enable high school students attending school in Midland to access the library conveniently after class.) It is likely that the cost of reimbursement may actually be less in total than establishing a formal service agreement, but this should be reviewed).

**Timeframe:** *Investigate reimbursement or service agreement with Springwater in the next two years (the 'immediate' timeframe) and evaluate performance. If this seems to be operating in a satisfactory manner, investigate similar arrangements with Midland in the medium-term.*

**Priority:** *Medium*

## 15. Hours of Operation

**Recommendation 9. Re-allocate Existing Hours of Operation in Branches to Provide Continuous Service.** There are two aspects to the notion of providing 'continuous service': one is to shift the hours of operation to open one hour later in the day, and eliminate the one-hour lunch break when the library is closed. The second aspect of this is to ensure that at least one branch is open on every day of the week, Monday through Saturday. This re-allocation of existing hours should take into account the fact that Waubauskene is open fewer hours to the public, reflecting the somewhat lower population of that community. Library staff should determine the best ways and means to implement this recommendation.

**Timeframe:** *Immediately, with a view to having a revised operating hours structure in place early in 2017.*

**Priority:** High

**Recommendation 10. Explore Sunday Opening as a Pilot Project in 2017.** There was some comment in the community survey to the effect that opening a branch on a Sunday would be desirable, and certainly other library systems have had great success with this time period. It is recommended that a pilot program offering a Sunday afternoon opening in a branch be explored in 2017. (A summer experiment of this sort would provide better service to the cottager residents or, alternately, Sunday hours in the fall would better serve students.) At the conclusion of the project, an evaluation should be undertaken to determine whether Sunday hours should be offered again the following year, or on a longer-term basis than just the pilot period.

**Timeframe:** Immediately, in order to offer Sunday hours in a branch in 2017.

**Priority:** High

## 16. Outreach

**Recommendation 11. Increase Outreach Services to Those Who Cannot Readily Access Branches.** The library system should actively increase its efforts in providing collections delivery service to those who cannot easily access the existing system, either through physical disability, lack of access to transportation, or who simply choose not to leave home. This could take the form of a few extra courier trips per week on average, at relatively low cost, or be a service offered by volunteers. In order to make this an effective service increase however, the Library will need to take steps to ensure that the overall community is aware of this possibility, and that there is an efficient and effective mechanism in place for its implementation.

**Timeframe:** Short-term

**Priority:** High

## 17. Technology

**Recommendation 12. Adopt the Technology Plan Outlined in Appendix D:** Given the pace of change of technology (hardware, as well as software and applications) community libraries are finding it necessary to develop specific technology plans that outline intentions in terms of technology acquisition and training, and recognize the budget implications. Appendix D is a sample technology plan that outlines the principles and structure of an approach that should be adopted in Tay Township, as well as the six steps that should be followed. Tay Library has elements of a technology plan in place including capital budgeting and a replacement schedule

for new equipment. This material can be formalized in the more detailed technology plan. The highlighted elements of this sample plan include:

- Adopting a technology goal of “*promoting use of library computers and Wi-Fi network with training programs*”
- Reviewing the existing WiFi network to ensure that working equipment and adequate bandwidth is in place
- Ensuring that the network is secure
- Acquisition of new tablets for in-house and off-site training (note that this is already an element of the Library’s capital budget)
- Purchase of a SirsiDynix MobileCirc license to enable promotion through offsite circulation and registration of new patrons

As well, note that the training element that would be involved in a technology plan are separately addressed in Recommendation 19.

***Timeframe:*** *Short-to-medium term*

***Priority:*** *High*

**Recommendation 13. Investigate Purchasing of Shelf-Ready Materials:** At present, there is a considerable amount of staff time spent in cataloguing and related technical activities. It is estimated that this amounts to 735 hours, or 1/3 of an FTE. Other community library systems have found that the amount of time spent on these activities can be reduced by purchasing shelf-ready materials at reasonable cost. (Many of the other libraries in the Simcoe County Library Co-operative purchase shelf-ready materials). Staff members have more time for local library management, program delivery, interaction with library patrons, working with volunteers, etc. In Tay’s case, it is not immediately or obviously clear that the additional cost of purchasing shelf-ready materials would be less expensive than paying staff, but it is an avenue that warrants investigation, especially in light of the fact that other comparable community library systems have found that this is a desirable strategic direction to pursue. Accordingly, we recommend that an investigation into the costs and benefits of this direction be undertaken. There are several suppliers who can provide this service but a popular one is the Library Services Centre, of which the Tay Township Public Library is already a member. A logical first step in this regard would be to invite the Library Services Centre to prepare a free assessment of Tay’s current processes and make a proposal of service to the Tay Township Public Library Board<sup>9</sup>.

***Timeframe:*** *Short-Term*

***Priority:*** *Medium*

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<sup>9</sup> <http://lsc.on.ca/>

## 18. Programs

### **Recommendation 14. Involve Volunteers in the Development and Delivery of New programs.**

A common theme mentioned in many of the community survey responses was a desire for a wider variety of programs to meet changing interests and needs in the community. However, it is apparent from interviews with staff that their ability to provide a wide variety of new programming is somewhat limited, although this will improve with the hiring of a Program and Community Relations Coordinator in the medium term (see subsequent recommendation). A potential solution lies in working with community volunteers who themselves might provide programming in the various areas desired, as a means of augmenting existing staff resources. The role of staff in this regard would be to help identify ideas for new programs; identify potential volunteers who could assist in the delivery of such programs; and to provide assistance and training as required to assist volunteers in the delivery of these activities.

Another avenue of volunteer involvement that should be explored as well (possibly in the Short-Term) is the potential for the use of Pages to assist patrons, assist with keeping branches tidy, help with library events, re-shelving of library materials, and other miscellaneous tasks around the branches. If high-school students were used as Pages, this could be an excellent way for them to fulfill their 40-hour community volunteer contract.

***Timeframe:*** Medium-term.

***Priority:*** Medium

## 19. Management and Staffing:

**Recommendation 15. Develop Succession Plan for Head Librarian.** The Head Librarian is currently eligible for retirement and has stated an intention to do this in the next year or so. We recommend that the Head Librarian and CEO functions be combined into one position, which is entirely appropriate for a library system serving a population the size of Tay Township. It is recommended that this be a full-time position. It is further recommended that this position be opened to outsiders (although, of course, eligible internal applicants would be welcomed as well). It is recommended that professional library qualifications be a requirement for the position.

***Timeframe:*** Immediate

***Priority:*** High

**Recommendation 16. Create Program and Community Relations Coordinator.** A second key position envisaged is a Program and Community Relations Coordinator. This position, also full time, would be responsible for the identification and delivery of new program options, using



volunteers to the maximum extent possible (see Recommendation #14). A companion function would be marketing and community relations, to ensure that the overall awareness of programs and services offered by the Tay Township Public Library in the general public was high. (This will also help to ensure that the metrics of demand discussed earlier are at a level that would support future physical expansion of the library system.)

***Timeframe:*** *Medium-term.*

***Priority:*** *High*

**Recommendation 17. Reconfigure Branch Librarian System to a Functional Orientation.** The current system has ‘branch librarians’ that have essentially a geographical orientation to their local community. A more efficient system would be to evolve to a functional orientation, where positions are aligned with more of an orientation towards key system requirements and activities serving the entire system, rather than a geographical focus. Three functional manager positions could be established, where the primary focus of the job would be upon a functional responsibility for the Tay Township Public Library system overall, with a secondary orientation towards branch coordination. (The three functional areas could be, for example, collections, programming, and digital technology.) The practical implementation of this system could be that these three positions spend 3-4 days per week in their ‘home branch’ and 1-2 days per week rotating to other branches, where they are able to undertake on-site assessments in their particular functional areas of responsibility.

***Timeframe:*** *Short-term.*

***Priority:*** *Medium*

**NOTE:** The revised staffing structure is shown as Option A in Section 9.2, which illustrates the proposed functional orientation as well as the new single CEO/Head Librarian, and the Community Engagement and Programs positions. Also shown is an interim transitional structure where the new combined CEO/Head Librarian position is also responsible for Community Engagement and Programs coordination, until such time as the Library Board is able to afford the two full-time positions in accordance with the recommendations contained herein. An advantage of this interim transitional structure would be that it would ensure that the CEO/Head Librarian position had solid experience in and understanding of community engagement and program development in the Tay environment, which would be an invaluable contextual background for this key leadership position.

**Recommendation 18. Revise Job Descriptions to Reflect Future Responsibilities:** Several of the recommendations contained herein will require a revision of current job descriptions and the outline of core competencies. This should be undertaken in advance of the succession plan for a new Head Librarian position, as well as a Program and Community Relations Coordinator.

Revised job descriptions should also reflect the functional as opposed to branch coordinator alignments.

***Timeframe:*** *Short-term.*

***Priority:*** *High*

**Recommendation 19. Increased and More Regular Staff Training Should Be Instituted:**

Interviews with the staff and our own observations as library professionals suggests that there could / should be additional staff training made available. Staff need to keep up with changing technology, be current with library standards and protocols, and exposed to new program possibilities. The ARUPLO standard recommends that no less than 1% of a public library system's budget be allocated to training and in fact a best practice standard is suggested as 2.5%: in Tay's case this would amount to a training budget of at least \$4,000, and even better \$10,000 (for materials, fees, travel costs, etc.). At present, there is only a \$600 training budget in place: most training that does occur is done 'on the job' and in large part on the initiative of the individual employee. Accordingly, it is recommended that a training budget be established and that the Head Librarian and CEO work together to identify where training needs are most pressing. Finally, the Library's written training policy should be updated and reviewed to embrace this direction. Possibilities noted in the course of this review include:

- Excel Program in Small Library Management for all staff (excepting students)
- Attendance at the Ontario Library Association Superconference
- Periodic courses and webinars provided by the Southern Ontario Library Service
- More cross-training for all employees across the system

***Timeframe:*** *Short-Term*

***Priority:*** *High*

**Recommendation 20. Consider Establishment of Friends' Group:** A comment that came out several times in the community survey as well as in the community meetings was the idea to establish a Friends' Group that could become involved in fundraising initiatives as well as assist the Library staff informally on a variety of issues (including programming, collections, etc.). Many other community library systems have successful and active Friends' Groups in place, that are able to help realize various improvement projects that otherwise might not be possible (i.e. with municipal funds and grants alone). This initiative would make the most sense to establish in the short to medium term, after some of the initial improvements in branches have been undertaken, and there is perceived momentum and interest generated.

***Timeframe:*** *Short-to-medium term*

**Priority: Medium**

## 20. Resource Requirements

The chart below outlines the costs associated with the implementation of the various recommendations contained in this Master Plan. For each, the key underlying cost assumptions are articulated, and then the best estimate (at this point in time) of costs is made, expressed in terms of 2016 dollars.

Recommendation	Assumptions	Estimated Capital Costs (rounded, in \$2016)	Estimated Additional Annual Operating Costs (rounded, in \$2016)
<b>Recommendation 1:</b> Maintain Existing Three-Branch System Over the Next Decade	By itself, will not entail any incremental capital or operating costs	\$0	\$0
<b>Recommendation 2:</b> Undertake Urgent Repairs to Waubaushene Branch	Minor costs for door repair and painting	\$117,000	\$0
<b>Recommendation 3:</b> Undertake Interim Expansion of Victoria Harbour Branch	Refresh existing space plus fit out Harbour Shores room	\$276,000	nominal
<b>Recommendation 4:</b> Undertake Upgrade and Accessibility Improvements to Port McNicoll Branch	Improvements as outlined in Appendix C will be undertaken	\$893,000	\$0
<b>Recommendation 5:</b> Food Service in the Branches is Not Recommended at this time	Will not incur any additional cost on either the capital or the operating side	\$0	\$0
<b>Recommendation 6:</b> Library branches should meet ARUPLO Standards in the Longer-Term	A) to be accomplished through expansion of Port McNicoll and Victoria Harbour, and relocation/expansion of Waubaushene: capital costs will be significant (see Appendix C) B) space-related operating costs outlined as per Appendix C	Estimated as \$2,376,000 – \$4,170,000 (see Appendix C)	Up to \$30,000 in additional building-related operating costs (see Appendix C)
<b>Recommendation 7:</b> Establish Accreditation of the Library System Over the Next 5 Years:	Will not incur any additional costs but will result in a truer cost accounting of Municipal Clerk position	\$0	\$0

<b>Recommendation</b>	<b>Assumptions</b>	<b>Estimated Capital Costs (rounded, in \$2016)</b>	<b>Estimated Additional Annual Operating Costs (rounded, in \$2016)</b>
<b>Recommendation 8:</b> Explore the Feasibility of Reimbursement for Memberships in Neighbouring Library Systems, or Service Agreements:	Assume here that Tay pays for service agreements for both Midland and Springwater (likely a maximum figure)	\$0	\$165,000 (maximum)
<b>Recommendation 9:</b> Re-allocate Existing Hours of Operation in Branches to Provide Continuous Service	Will not incur any additional cost on either the capital or the operating side; this would just represent a re-allocation of existing resources	\$0	\$0
<b>Recommendation 10:</b> Explore Sunday Opening as a Pilot Project in 2017	Nominal additional budget required (e.g. 10 weeks times 8 hours per week – i.e. two students over a 4-hour period in the afternoon)	\$0	\$2,000
<b>Recommendation 11:</b> Increase Outreach Services to Those Who Cannot Readily Access Branches	Courier service is accelerated to 2-3 times per week; at the same time, more active marketing efforts should be in place to encourage awareness and interest	\$0	\$2,000
<b>Recommendation 12:</b> Adopt the Technology Plan Outlined in Appendix D	See Appendix D for details	\$0	\$5,000 (likely)
<b>Recommendation 13:</b> Investigate Purchasing of Shelf-Ready Materials	Cost of technology estimated in Appendix D	\$0	\$3,000 <sup>10</sup>
<b>Recommendation 14:</b> Involve Volunteers in the Development and Delivery of New programs	Some staff time involved in training and working with volunteers, but not separately costed	\$0	\$0
<b>Recommendation 15:</b> Develop Succession Plan for Head Librarian	Assume that salary and benefits package could range from \$50,000 to \$80,000 – assume mid-point of this range	\$0	\$40,000 (estimated additional costs over existing wages paid)
<b>Recommendation 16:</b> Create Program and Community Relations Coordinator	Assume that salary and benefits package could range from \$40,000 to \$60,000 – assume mid-point of this range	\$0	\$25,000 (estimated additional costs over existing wages paid)

<sup>10</sup> This cost would be offset by savings, or redeployment of 1/3 of an FTE.

<b>Recommendation</b>	<b>Assumptions</b>	<b>Estimated Capital Costs (rounded, in \$2016)</b>	<b>Estimated Additional Annual Operating Costs (rounded, in \$2016)</b>
<b>Recommendation 17:</b> Reconfigure Branch Manager System to a Functional Orientation	Some additional training may be required to 'groom' individuals into their coordinator roles, but this is covered in training budget in Recommendation #19	\$0	\$0
<b>Recommendation 18:</b> Revise Job Descriptions to Reflect Future Responsibilities	Will requires staff time but not entail any additional out-of-pocket expense	\$0	\$0
<b>Recommendation 19:</b> Increased and More Regular Staff Training Should Be Instituted	Target budget allocation is 1% to 2.5% of operating budget, which would imply a budget between \$4,000 and \$10,000 – assume half way point	\$0	\$7,000
<b>Recommendation 20:</b> Consider Establishment of Friends' Group	Minimal effort other than staff time	\$0	\$0
<b>Total Estimated Additional Cost Over the Implementation Period (in \$2016)</b>		<b>\$3.662 - \$5.350 million</b>	<b>\$332,000</b>

## 21. Next Steps

It is recommended that this Master Plan be approved in principle first by the Tay Township Public Library Board and secondly endorsed by Council. This should occur as early in 2017 as possible. In approving the Master Plan, the Library Board should then refer it to staff for implementation. A report on implementation activities in 2017 should be prepared by staff and presented to the Board and Council, outlining progress made as of that date, reasons why key initiatives may have been delayed or deferred, new opportunities that may have arisen, etc.



# Tay Township Public Library Master Plan

April 24, 2017

# Library Master Plan

<b>Recommendation 1: Maintain Existing Three-Branch System Over the Next Decade</b>	Recommendation Supported to maintain existing three branch system
<b>Recommendation 2: Undertake Urgent Repairs to Waubaushene Branch</b>	Board direction to not proceed with door replacement 2019 LTP – Accessibility Renovation to Current Front Entrance (\$120,000) 2020 LTP – Paint & new carpet
<b>Recommendation 3: Undertake Interim Expansion of Victoria Harbour Branch</b>	Per Board direction, architect estimate received for potential expansion into Accountant's Office space (\$63,000), later expansion into Harbour Shores Community Room (\$29,500). Note: estimates do not include furnishings for the space
<b>Recommendation 4: Undertake Upgrade and Accessibility Improvements to Port McNicoll Branch</b>	Board direction to put RFI/RFP out in LTP for 2022 for design of upgrades and accessibility improvements (\$10,000) with construction in 2025 (\$245,000)
<b>Recommendation 6: Library branches should meet ARUPLO Standards in the Longer-Term</b>	See Recommendations #2-4 Requested that LTP funding for any Waubaushene Branch renovations remain available as partial funding for future Waubaushene Community Centre, and library relocation as part of that opportunity

# Library Master Plan

<b>Recommendation 5: Food Service in the Branches is Not Recommended at this time</b>	Recommendation Supported
<b>Recommendation 7. Establish Accreditation of the Library System Over the Next 5 Years:</b>	As a step towards accreditation, pursue formal Memorandum of Understanding between Township & Library (i.e. budget, roles, responsibilities, etc.) Move forward with accreditation over medium term
<b>Recommendation 8: Explore the Feasibility of Reimbursement for Memberships in Neighbouring Library Systems, or Service Agreements:</b>	Explore opportunity for no cost joint reciprocal membership arrangement with Midland Public Library (i.e. Tay library patron may use Midland Library at no costs, and vice versa so long as they have a membership in their 'home' library) and Springwater Public Library, Elmvale Branch, for use by rural & Waverley residents



# Library Master Plan

<b>Recommendation 9: Re-allocate Existing Hours of Operation in Branches to Provide Continuous Service</b>	Recommendation Supported – Board received reports from staff at March & April meetings respecting proposed change in hours
<b>Recommendation 10: Explore Sunday Opening as a Pilot Project in 2017</b>	Recommendation Supported– Board received reports from staff at March & April meetings respecting proposed change in hours – Proposed Sunday Trial for June-August 2017 at a single branch
<b>Recommendation 11: Increase Outreach Services to Those Who Cannot Readily Access Branches</b>	Board to review mileage policy to provide for book delivery, travel between branches during shifts Staff to report back on use/expansion of current book courier service
<b>Recommendation 12: Adopt the Technology Plan Outlined in Appendix D</b>	Board direction to include replacement of tablets in LTP Maintain existing LTP technology plan
<b>Recommendation 13: Investigate Purchasing of Shelf-Ready Materials</b>	Board direction to contact vendor respecting shelf-ready materials for free assessment of current system and proposal for service

# Library Master Plan

<b>Recommendation 14: Involve Volunteers in the Development and Delivery of New programs</b>	Ongoing and existing practice Staff time required to facilitate further expansion
<b>Recommendation 15: Develop Succession Plan for Head Librarian</b>	Board recommends replacement of Head Librarian with full time Library C.E.O. (anticipated 2018 Budget)
<b>Recommendation 16: Create Program and Community Relations Coordinator</b>	Staff directed to review and report back at a future meeting
<b>Recommendation 17: Reconfigure Branch Manager System to a Functional Orientation</b>	Staff directed to review and report back at a future meeting
<b>Recommendation 18: Revise Job Descriptions to Reflect Future Responsibilities</b>	Staff directed to review and report back at a future meeting
<b>Recommendation 19: Increased and More Regular Staff Training Should Be Instituted</b>	Staff directed to review and report back with an update to the Training & Development Policy Small increase annually in training budget to commence in 2018 (increase of \$500/year)
<b>Recommendation 20: Consider Establishment of Friends' Group</b>	Currently in progress as existing Marjorie Young Volunteer Group explores possibility of evolving to a Tay-wide Volunteer Group, rather than the existing PM focused group



# Library Master Plan

- Next Steps
  - Board will move forward items within its authority (i.e. change in hours, review of book ordering/materials)
  - Items with budget impact will come forward in 2018 Budget and Long Term Plan
  - Board is seeking Council direction in the near future with respect capital improvements for the three branches so that the library may plan or amend their Long Term Plan accordingly