



**MEETING AGENDA**  
**Stormont, Dundas and Glengarry County Library Board**

**Thursday, May 23, 2024, 5:00 p.m.**

**Iroquois Branch**

**1 Dundas Street, Iroquois ON**

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	<b>Pages</b>
<b>1. Call to Order</b>	
<b>2. Adoption of Agenda</b>	
a. Additions, Deletions or Amendments Additions to or deletions from the Agenda must be made upon consultation with the Board Chair prior to the meeting. All matters listed under “Consent Items” are considered to be routine and will be enacted by one motion. Should a Board member wish an alternative action from the proposed recommendation, s/he may request that the matter(s) be moved to the appropriate section at this time.	
<b>3. Declaration of Pecuniary Interest</b>	
<b>4. Adoption of Minutes</b>	
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**9. In Camera**

HR Matter

Pursuant to the Stormont, Dundas and Glengarry County Library Board's Procedure Bylaw 5.2(b), and PLA 16.1(4)(b), personal matters about an identifiable individual, including municipal or local board employees.

**10. Adjournment**

# Stormont, Dundas and Glengarry County Library Board

## Minutes

April 17, 2024, 3:30 p.m.

Finch Branch

17 George Street, Finch ON

Members Present: Margaret MacDonald, Chair; Tony Fraser, Vice-Chair; Jason Broad; François Landry; Lachlan McDonald; Jim Algire; Jo-Anne McCaslin

Staff Present: Maureen Adams, CAO of SDG Counties; Rebecca Luck, Director of Library Services; Kate Jones-Miner, District 1 Supervisor; Jessica Lomborg, District 2 Supervisor, Emily Andrews, Temporary District 3 Supervisor; Josée Cousineau, Library Services Assistant (Finch Branch)

Other: Lynne Lafleche, Vice-Chair of the Friends of the Crysler Library

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1. **Call to Order** – Meeting was called to order at 3:32pm.

2. **Adoption of Agenda**

**Moved by** Jason Broad

**Seconded by** James Algire

That the Stormont, Dundas and Glengarry County Library Board approves the Meeting Agenda, as amended.

**CARRIED**

2.1 **Additions, Deletions or Amendments**

Consent item 6b. Statistical Summary (Quarterly) – January-March 2024 was put forward as a discussion item.

Item 8a. Dalkeith Express Update was added to Discussion Items.

“Finch MakerLab Tour – In Person” was renumbered to item 8b.

3. **Declaration of Pecuniary Interest** – none

#### **4. Adoption of Minutes**

##### **4.1 Library Board Regular Meeting Minutes - March 28, 2024**

**Moved by** Lachlan McDonald

**Seconded by** Jo-Anne McCaslin

That the Stormont, Dundas & Glengarry County Library Board approves the Minutes of the March 28, 2024 regular meeting, as written.

**CARRIED**

#### **5. Delegations**

Lynne Lafleche, Vice-Chair of the Friends of the Crysler Library, provided the Board members with a summary of the Friends' group activity, including:

- a) The group was initially formed as a crisis response to the threat of closing the Crysler branch.
- b) The group now meets every other month.
- c) In partnership with the Friends of the Crysler Library, the Crysler branch is hosting the National Canadian Film Day on April 18<sup>th</sup> at the Crysler Community Centre.
- d) The group is planning to host a multitude of community programs, including "Touch a Truck" on June 1<sup>st</sup>, Mother's Day kits, and a local French author visit in the Fall.

Josée Cousineau, Library Services Assistant at the Finch Library branch, provided the Board with a quick overview of the MakerLab and how it functions as part of the SDG Library system.

#### **6. Consent Items**

**Moved by** Tony Fraser

**Seconded by** François Landry

That the Stormont, Dundas and Glengarry County Library Board approves all items listed under the Consent Items section of the Agenda, as presented.

**CARRIED**

##### **6.a Statistical Summary (Circulation) - March 2024**

##### **6.b Statistical Summary (Quarterly) - January - March 2024**

Board member Jason Broad appreciated the addition of graphs to illustrate trends over the years.

It was noted that the number of new memberships does not include renewals.

**6.c Financial Report - March 2024**

**6.d Director of Library Services Report - March 2024**

**6.e Correspondence**

**7. Action Items**

**7.a Facility Use Policy - Review**

**Moved by** James Algire

**Seconded by** Lachlan McDonald

That the Stormont, Dundas, and Glengarry County Library Board approve the Facility Use Policy, as presented.

**CARRIED**

**7.b 2024 MakerLab Plan**

**Moved by** Jason Broad

**Seconded by** Jo-Anne McCaslin

That the Stormont, Dundas, and Glengarry County Library Board approve the 2024 MakerLab Plan, as presented.

**CARRIED**

**8. Discussion Items**

**8.a Dalkeith Express Update**

The Director of Library Services provided an update to the Board regarding the Dalkeith Express Depot, specifically the site visit held on February 29, 2024, and the subsequent meeting with the Mayor of North Glengarry on April 15, 2024. A motion will be brought forward to the Board at the next meeting, to be held in May.

**8.b Finch MakerLab Tour - In Person**

Board members were provided the opportunity to connect, create, and explore using the new MakerLab equipment by making a mug, tote bag, button, and a personalized notebook and pen. Board members were also provided a demonstration of how the new 3D printer functions, demonstrating the printing of a sticky-note holder, personalized with the SDG Library's logo.

9. **In Camera**

10. **Adjournment**

**Moved by** James Algire

**Seconded by** Lachlan McDonald

That the Regular Meeting of the Stormont, Dundas and Glengarry County Library Board be adjourned, to meet again at the Call of the Chair.

**CARRIED**

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Board Chair/Vice Chair

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Secretary

DRAFT

# SDG Library

## April 2024 Statistical Summary

Branch & Open Hours Per Week	Circulation					Borrowers	Visitors	New Patrons
	Print & A/V	eBooks & eAudiobooks	April 2024 Total	April 2023 Total	April 2024/2023 Difference			
Administration	280	7740	8020	9243	-13.2%	21	N/A	2
Alexandria (44)	3047	254	3301	3077	+7.3%	463	1375	30
Avonmore (20)	587	70	657	683	-3.8%	105	301	4
Chesterville (17)	1124	173	1297	1063	+22.0%	171	359	10
Crysler (20)	1222	38	1260	1312	-4.0%	114	605	2
Dalkeith Express	3	5	8	7	+14.3%	5	N/A	0
Finch (16)	437	43	480	443	+8.4%	63	177	5
Glen Walter Express	42	5	47	44	+6.8%	19	N/A	0
Ingleside (44)	1752	149	1901	1730	+9.9%	270	1406	10
Iroquois (20)	890	92	982	1056	-7.0%	179	556	13
Lancaster (44)	1340	136	1476	1336	+10.5%	246	713	23
Long Sault (30)	1448	175	1623	1471	+10.3%	284	680	23
Maxville (16)	535	73	608	708	-14.1%	81	179	7
Morewood Express	17	0	17	0	N/A	5	N/A	0
Morrisburg (44)	1494	121	1615	1463	+10.4%	313	965	20
South Mountain (16)	825	67	892	702	+27.1%	124	346	7
St. Andrews Express	69	7	76	115	-33.9%	24	N/A	2
Williamsburg (16)	453	55	508	527	-3.6%	81	197	4
Williamstown (17)	684	97	781	803	-2.7%	117	279	23
Winchester (44)	2094	208	2302	1990	+15.7%	344	1077	23
<b>SYSTEM TOTAL</b>	<b>18343</b>	<b>9508</b>	<b>27851</b>	<b>27773</b>	<b>+0.3%</b>	<b>3029</b>	<b>9215</b>	<b>208</b>

"Visitors" are members and non-members visiting a branch.

"Borrowers" are unique patrons checking out and renewing library materials.

\* Administration Branch statistics for eBooks & eAudiobooks can be broken down into SDG Users at Counties Admin + Cloudlink users

eBooks & eAudiobooks	
cloudLibrary-Patron Usage	4847
cloudLibrary-Collection Usage	9508

**LIBRARY MONTHLY STATEMENT**



For Period Ending 30-Apr-2024

	2024	2024	2024	2023	2023	2023
	ACTUAL	BUDGET	VARIANCE	ACTUAL	BUDGET	VARIANCE
<b>GENERAL FUND</b>						
<b>REVENUE</b>						
ANNUAL PROVINCIAL FUNDING	0	-131,761	-131,761	-131,761	-131,761	0
ONTARIO CAPACITY FUNDING	0	-1,000	-1,000	-3,550	-1,500	2,050
STUDENT FUNDING	0	-8,300	-8,300	-8,152	-5,000	3,152
FEES & FINES	-4,594	-10,000	-5,406	-13,289	-11,500	1,789
DONATIONS & SALES	-5,146	-5,750	-604	-13,918	-7,850	6,068
TRANSFER FROM RESERVES	0	-308,332	-308,332	-41,035	-204,420	-163,385
<b>Total REVENUE</b>	<b>-9,740</b>	<b>-465,143</b>	<b>-455,403</b>	<b>-211,704</b>	<b>-362,031</b>	<b>-150,327</b>
<b>EXPENSES</b>						
FULL TIME WAGES & BENEFITS	297,576	977,450	679,874	806,635	936,733	130,098
BRANCH WAGES & BENEFITS	278,900	915,069	636,169	861,587	793,444	-68,143
STUDENT WAGES & BENEFITS	0	23,408	23,408	23,847	22,971	-876
BOARD MEETINGS & DEVELOPMENT	2,264	13,232	10,968	8,753	8,250	-503
STAFF MILEAGE	518	10,372	9,854	10,704	6,200	-4,504
STAFF TRAINING & DEVELOPMENT	4,061	24,918	20,857	15,370	19,715	4,345
PRINT MATERIAL	30,878	185,500	154,622	152,853	175,500	22,647
DIGITAL BOOKS	17,693	95,000	77,307	90,549	95,000	4,451
DATABASE SUBSCRIPTIONS	44,090	66,526	22,436	48,107	62,761	14,654
MAGAZINES, PERIODICALS & LEASED BOOKS	3,618	3,950	332	7,325	13,217	5,892
SUPPLIES & EQUIPMENT	4,675	28,470	23,795	27,323	28,603	1,280
CREDIT CARD FEES	59	115	56	31	0	-31
PHONES & INTERNET	14,020	57,496	43,476	55,168	57,688	2,520
PROMOTIONS & WEBSITE	42,189	75,030	32,841	73,548	87,000	13,452
PUBLIC PROGRAMS	444	12,400	11,956	10,160	11,500	1,340
COMPUTER PURCHASES	2,655	7,929	5,274	8,305	8,900	595
SOFTWARE SUPPORT	37,395	52,548	15,153	66,584	66,302	-282
DELIVERY & OUTREACH VEHICLES	206	32,000	31,794	45,813	46,250	437
COPIERS & PRINTERS	1,930	10,000	8,070	6,626	10,000	3,374
COPYRIGHT & PERFORMANCES LICENSES	2,113	2,319	206	2,089	2,119	30
BRANCH CLEANING	640	5,000	4,360	8,154	10,000	1,846
BRANCH RENTS, INSURANCE & SECURITY	4,117	244,804	240,687	236,126	234,759	-1,367
FURNITURE PURCHASE	122	64,250	64,128	81,901	84,200	2,299
AUDIT & LEGAL FEES	0	3,600	3,600	3,460	3,750	290
SPECIAL PROJECTS	486	9,400	8,914	21,990	41,150	19,160
SUPPORT FROM OTHER DEPARTMENTS	0	188,093	188,093	159,752	159,752	0
TRANSFER TO RESERVES	0	0	0	22,677	20,000	-2,677
<b>Total EXPENSES</b>	<b>790,648</b>	<b>3,108,879</b>	<b>2,318,231</b>	<b>2,855,437</b>	<b>3,005,764</b>	<b>150,327</b>
<b>Total GENERAL FUND</b>	<b>780,909</b>	<b>2,643,736</b>	<b>1,862,827</b>	<b>2,643,733</b>	<b>2,643,733</b>	<b>0</b>



**INFORMATION REPORT**

**PREPARED BY:** Rebecca Luck – Director of Library Services

**PREPARED FOR:** SDG Library Board

**LIBRARY BOARD DATE:** May 23, 2024

**SUBJECT:** Director of Library Services Report

**STAFFING HIGHLIGHTS:**

Commencing April 22<sup>nd</sup>, Jessica Last will be transitioning in her role as a Casual Support Assistant to a Library Services Assistant at the Winchester Branch.

Successfully recruited three (3) Casual Support Assistants:

Lyndsay MacKinnon (District 1)  
Marsha Sylvia (District 2)  
Lisa Kattelus (District 3)

**DIRECTOR OF LIBRARY SERVICES: (Rebecca L.)**

- Attended County Council meeting (April 15).
- Attended weekly Director’s meetings with CAO and fellow County Directors.
- Attended and facilitated Management Team and Administrative meetings.
- Attended OLS meeting (April 11).
- Attended meetings with staff to discuss the launch of the May-ker month program in Finch.
- In conjunction with the Communications and Marketing Coordinator, developed a Maker Plan that is representative of the goals and objectives of what the Maker Space wishes to achieve in the 2024 calendar year.
- Held SDG Reads Committee kick-off meeting with staff who have expressed interest in being part of this year’s planning committee. The meeting discussed social media clues, big book launch, sponsorship opportunities, marketing materials, and general outline for night of the event.
- Attended County’s birthday break (April 30).
- Coordinated a bulk order for SDG Reads’ featured book; to be sold in branches after May’s “big book” reveal.
- Prepared the Library Board Meeting Agenda and attended the Library Board regular meeting – Wednesday, April 17, 2024, 3:30pm at Finch Library branch.
- Preparing material for the onboarding of new Community Librarian.
- Completing branch tours to introduce new Community Librarian to our members of staff.
- Preparing for May’s General Staff Meeting; anticipated to be held May 27<sup>th</sup>.
- Coordinating with OLS and Amedeo Bernardi Consulting Inc. for potential upgrades to the Williamsburg branch internet (through the Connecting Public Libraries Initiative).
- Reviewed and submitted the 2023 Annual Survey information to the Ministry of Tourism, Culture and Sport.
- In communication with Meaghan Meerburg (Township of North Dundas) regarding the Chesterville Public Library branch.

### ACTION REQUEST

<b><u>PREPARED BY:</u></b>	Rebecca Luck – Director of Library Services
<b><u>PREPARED FOR:</u></b>	SDG Library Board
<b><u>LIBRARY BOARD DATE:</u></b>	May 23, 2024
<b><u>SUBJECT:</u></b>	Facilities Policy - Review

### **BACKGROUND:**

1. The Facilities Policy sets out a framework on rendering library services through the establishment of physical branch facilities, alternate service delivery methods, and through virtual library services.
2. The Facilities Policy was first approved by the Board in April 2017, and was last reviewed May 2019.

### **ANALYSIS:**

3. It is recommended that the Policy be amended to include the following:
  - a. The newest fourth edition of the ARUPLO Guidelines for Rural / Urban Public Library Systems.
  - b. Revised lease agreement template.

### **IMPACT ON 2024 BUDGET:**

4. N/A

### **ALIGNMENT WITH STRATEGIC PLAN:**

Goal 1: Growing our Physical and Digital Infrastructure

### **RECOMMENDATION(S):**

That the Stormont, Dundas, and Glengarry County Library Board approve the Facilities Policy, as presented.



# Facilities Policy

**For:** The Stormont, Dundas and Glengarry  
County Library Board

**Policy No.:** 2024-05

**Policy Type:** Operational

**Effective Date:** May 23, 2024  
**Date of Last Revision:** May 9, 2019  
**First Approved:** April 13, 2017

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## **Purpose:**

The Stormont, Dundas and Glengarry County Library Board is committed to providing effective, relevant, and responsive library services to the residents, businesses and government bodies of the United Counties of Stormont, Dundas, and Glengarry. This will be accomplished by offering services at our physical branch facilities, by the provision of alternate service delivery methods such as the “Pop Up” Library (at community events), at “Library Express” depots in areas without facilities, and/or by the provision of “virtual” library services via the Library’s website, [www.sdqlibrary.ca](http://www.sdqlibrary.ca).

## **Responsibility of the Local Municipality:**

It is the responsibility of the local municipality in which the branch library is located to provide a suitable space for its operation. Suitability is based on accepted guidelines provided by provincial library associations, using the expertise of those associations. Upon approval of the Library Board, the Library may also rent appropriate facilities from other organizations or individuals when a municipally provided space is not available.

## **1. Branch Library Facilities**

### **1.1 Location and Number**

The location, number and size of branch libraries will be planned with the approval of the Library Board and funded by the Council of the United Counties of Stormont, Dundas, and Glengarry.

- 1.1.1** Branch library facility requirements shall be determined by the Library Board in consultation with staff and with the opportunity to receive a presentation from the local municipality involved.
- 1.1.2** Co-location with other community services will be considered on a case-by-case basis.
- 1.1.3** Locations with easy access, parking and visibility in population centres will be preferred.

### **1.2 Space Requirements and Size**

The amount of space required by a public library depends on the unique needs of the individual community. For new or re-located facility planning standards, the Board will use the *Administrators of Rural-Urban Public Libraries of Ontario (ARUPLO) Guidelines for*

# Facilities Policy

*Rural/Urban Public Library Systems* as a basic guide in determining the suitability of the space provided by or proposed by a municipality (see Appendix A).

## 1.3 Accessibility Standards

The Accessibility of Ontarians with Disabilities Act (AODA) standards for Accessible Built Environment and for Accessible Customer Service shall be used to determine the suitability of the space provided by or proposed by a municipality.

## 1.4 Leasing Standards

The Stormont, Dundas and Glengarry County Library Board will lease space from the facility provider using a standard lease agreement (see Appendix B).

- 1.4.1 The lease agreement will set out the respective responsibilities of the Board and the local municipality or organization or individual.
- 1.4.2 The lease agreement will be customized as appropriate for each branch facility.

## 1.5 Safety Standards

Library branch facilities must provide a safe and secure workplace for staff and must comply with pertinent legislation.

All public areas within the branch facilities must have clear lines of sight for adequate supervision of the space. Library entrances, staff entrances, pathways, pedestrian walkways, and parking areas should be adequately illuminated with appropriate exterior lighting to support the visibility of hazards.

Regular inspections at all branch facilities will be completed by the Joint Health and Safety Committee, and all concerns raised during the physical inspection will be recorded and signed by the member(s) performing the inspection. In the case of a recommendation made by the Joint Health and Safety Committee, the Director of Library Services will bring any facility issues to the Library Board, and the Director will respond within 21 days, indicating what action will, or will not be implemented as a result.

## 1.6 Facility Types and Service Levels

Effective evaluation and assessment of a Library branch's needs is best achieved if each facility is treated separately, keeping in mind its service area and needs of the municipality.

- 1.6.1 A *Resource Library branch* is intended to be "the" facility in a community where visitors can find a full range of services, including programs for all ages, informational training and resources, and access to government resources and services. It will include a number of public access computers and will provide free wireless access for Library members and visitors. This type of branch will include a broad range of services, as defined the Strategic Plan.

# Facilities Policy

Every local municipality will strive to have at least one Resource Branch.

- 1.6.2** A *Neighborhood branch* serves the designated service area surrounding it. It may provide selective programs and services in addition to circulating popular fiction materials for all ages, modest information (non-fiction) collections, and/or a local history collection, but it will not offer the same level of service as a Resource branch. It will include one or more public access computers and will have free wireless access for Library members.
- 1.6.3** A *Library Express depot* will be established as a signed partnership with a local business and is intended to provide the population in a designated service area lacking a branch facility with access to the Library's circulating collections. Public access computers and free wireless access will not be provided unless already offered by the local business involved. Hours of operation will be concurrent with that of the business partner.

## 2. Service Level Review

The Library Board will review and assess services at each facility at least every two years using the following metrics: circulation, number of active users, amount of walk-in traffic, number of new patrons, program attendance, environmental conditions, accessibility standards and/or use of Library technologies at that branch.

## 3. Open Hours

The number of open hours for a branch will be decided by the Board, based on factors such as circulation and use statistics, service level review (see above) and recognized need in the community. Scheduling open hours will be determined by the Director of Library Services in consultation with staff.

## 4. Signage

### 4.1 Exterior Signage

The intent of exterior signage is to provide clear directional and identification signage for branches of the Library. Visually appealing and consistent signage throughout will ensure Library branch identification recognition. The overall principles for all exterior library signs are that they will be durable (both weather and fade resistant) and easily changed as the need arises.

Any cost-sharing arrangements between the Library Board, the local municipality and fundraising bodies will be discussed on a case-by-case basis. Library staff will work cooperatively with the local municipality to determine the successful development, specifications, fabrication, installation, and ultimate maintenance of the exterior sign. Library staff will grant final approval for the sign artwork and its location.

# Facilities Policy

## 4.2 Directional (Road) Signs

Directional road signage will indicate the presence and location of the Library in the community. Whenever possible, the Library will work with the Transportation and Planning Department of the United Counties of Stormont, Dundas and Glengarry to erect directional signage.

## 4.3 Interior Signs

Systemic interior signs will allow self-directed use of each branch facility.

DRAFT

**APPENDIX A**

ARUPLO

Guidelines for Rural / Urban Public Library Systems – 4<sup>th</sup> Edition  
Administrators of Rural and Urban Public Libraries of Ontario  
Revised June 2023



# Guidelines For Rural/Urban Public Library Systems

## 4<sup>th</sup> edition

**Administrators of Rural and Urban  
Public Libraries of Ontario**

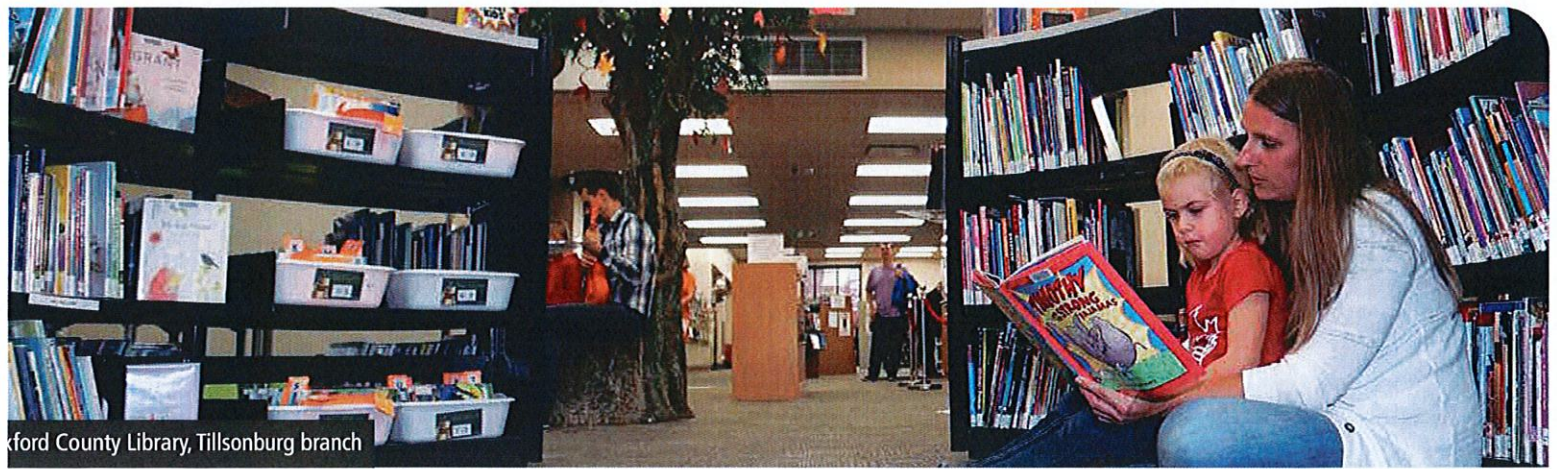
Revised June, 2023





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York County Library, Tillsburg branch

# 1. Introduction

The Guidelines for Rural/Urban Public Library Systems are a developmental tool for rural/urban and county libraries. The Guidelines are expressed as targets for a library to provide an appropriate level of service for its community. They have been developed by the library administrators of ARUPLO public libraries based on:

- Their considerable collective expertise;
- Comparative data and research regarding other jurisdictions;
- Trends and changes in rural/urban Ontario.

Guidelines are generally regarded as quantifiable and can be benchmarked. They are recommendations as to how things should be done. *Best Practices* represent what is well done by peers and what should be an aspiration by those looking to be a site of excellence.

Municipal libraries must conform to provisions of the *Public Libraries Act*, the *Municipal Act*, *Accessibility for Ontarians with Disabilities Act*, and other relevant legislation and are accountable to the communities they serve. (The term “municipal libraries” herein references interchangeably county, union, and municipal libraries.)

Reports on general efficiency and effectiveness of service delivery are annual requirements for all municipal libraries. However, there is also a need for more specific guidelines and best practices relevant to rural/urban public libraries in Ontario.

These guidelines build on and are supplementary to the [Ontario Public Library Guidelines](#).

## The Intended Use of the Guidelines

ARUPLO Libraries have made the following commitments with respect to the guidelines:

- The guidelines and best practices describe an appropriate level of service for ARUPLO libraries;
- The guidelines and best practices will be used on a regular basis by ARUPLO libraries to evaluate current and plan future library services;
- While the guidelines and best practices will be used in conjunction with other similar products, including the Ontario Public Library Guidelines, they are considered most applicable to the multi-branch rural/urban nature of the ARUPLO library systems.



The work of the Fourth Edition took place during a period of recovery from the COVID-19 pandemic. Significant service changes were made in reaction to the closures and public health restrictions imposed during the pandemic. The extent to which these changes will be retained, adapted, and incorporated in established service delivery models remains to be seen.

The pandemic forced public libraries to pursue innovations, many of which created new ways for existing library clientele and new user populations to access library services, thus breaking down barriers.

## 2. Trends and Changes in Rural/Urban Ontario

The Guidelines for Rural/Urban Public Library Systems identify appropriate service levels that reflect the changing nature of municipalities and public libraries serving rural and rural/urban Ontario. Rural/Urban Ontario refers to those communities that are close to larger urban centres and that have integral service, schooling and shopping relationships with urban areas.

### Rural Sustainability

Changing demographics are placing increasing pressures on the sustainability of rural communities, including the ability to provide an array of services, such as public libraries. The face of rural communities is changing rapidly as a result of increased urbanization across Ontario, an aging and increasingly diverse population, and the impact of technology and remote work and education on rural lifestyles. Rural communities need to find creative ways to sustain themselves and ensure that services can meet growing needs and expectations.

#### Factors affecting rural sustainability include:

1. Rural life is based on much more than agriculture; only a small percentage of rural residents work in agriculture. Much of modern agriculture is industrialized, intensified and automated.
2. Dominant rural employment is small to medium-sized manufacturing and services.
3. The ability to provide high-speed connectivity and communications infrastructure supports rural employment in knowledge-based, cultural, and creative occupations, increasingly through telecommuting and working from home. While highspeed Internet is becoming more readily available in rural areas, issues of affordability remain a serious barrier for low-income residents.
4. Many rural residents commute to a city for work, work from home, or are self-employed. Rural entrepreneurship is on the rise.
5. The influx of ex-urbanites to rural areas in search of more affordable housing and/or desirable lifestyle change is intensifying due to the post-pandemic rise in work-from-home arrangements. New residents to rural areas bring increased diversity and broader service level expectations reminiscent of what they enjoyed in larger urban communities.
6. While many ARUPLO member municipalities are experiencing rapid growth, others are not, with some seeing declining population numbers, thus creating a disparity in availability of growth-related funding.
7. Out-migration continues as young people leave rural areas for post-secondary education and tend not to return due to greater employment opportunities in larger urban centres.
8. Escalating housing costs and lack of affordable supply are impacting rural residents' housing choices.
9. Cottages and seasonal residences are being renovated to become permanent and retirement homes. The growth in work-from-home arrangements has intensified this trend.
10. Part-time and seasonal residents, particularly in high tourist areas, require access to library services and should be accounted for in population calculations, regardless of how Ministries or Census Canada counts these residents.
11. There is increased focus and investment in outdoor and tourism-based economic and social activities (eco-tourism, culinary/agri-tourism, trails systems, outdoor sports amenities).
12. Needs of an older adult population require investment in infrastructure for age-friendly housing, social and recreational services, long-term care, and health services.
13. Lack of public transit options creates car dependency and mobility problems for lower income, student, and other populations experiencing barriers to accessing services.
14. There is a shortage of recreational opportunities for children and teens.
15. There is increasing rates of homelessness, precarious housing, and mental health issues, senior isolation, food insecurities, and the need to support vulnerable populations in rural communities.
16. Traditional rural society was based on social gatherings and relationships, community involvement and volunteerism. Fewer community connections and declining volunteerism are threatening traditional rural social institutions.



**Building a sense of connection to the community for residents is challenging, given that it requires involvement and investment, and it is not always clear how to start or where to go. The social constructs for community participation, including public library service, have to be able to understand, appeal to and fit with residents' interests and lifestyles.**

**The public library has a role in bridging social capital. As a shared and accessible public space, the library can bring together diverse people, facilitate civic engagement, and help create a stronger community.**

## Libraries' Role in Rural Sustainability and Community Wellbeing



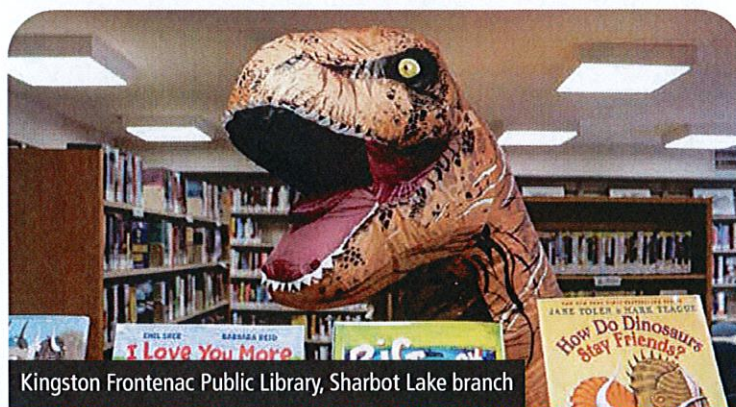
The library system contributes to municipal strategic initiatives through a strategic plan which:

- Reflects the vision in the municipalities' planning documents;
- Contains strategies that are complementary to those contained in the municipalities' strategic plans;
- Positions the library as an integral partner in community development.

The key to rural development and rural sustainability is a more informed, innovative, and inclusive community. The Ontario Public Library Guidelines state "The library has established partnerships with other organizations in the community in order to coordinate resources and actions, thereby jointly improving service to the community (e.g. with schools, literacy programs, chambers of commerce, heritage groups, government offices, and advocate groups)."

**To help address the factors affecting rural sustainability, the library needs to:**

1. Provide all residents with equitable access to quality information through connectivity and a comprehensive range of online resources and databases.
2. Facilitate the delivery of government services, as a local access point in the community providing trained staff, connectivity, and navigational assistance.
3. Locate library facilities in existing village and town clusters or rural service centres in order to maximize opportunities for co-locations and community hub models.
4. Practise community-led librarianship to develop and maintain relationships, understand needs, and share resources. Participate in community organizations and events.
5. Work with community agencies in the delivery of programs and resources that build and strengthen literacies and innovation.
6. Arrange for reciprocal borrowing arrangements with neighbouring city, town, and county library systems in order to serve residents who commute outside of their home community to work.
7. Form partnerships with local schools and post-secondary institutions, including reciprocal borrowing arrangements, to support student success and promote the use of public library services.
8. Provide services to those pursuing education through home schooling, distance education, and on-line learning.
9. Provide the technological tools and a climate of discovery to ensure that rural communities have access to new and emerging technologies and a place to learn, explore and collaborate.
10. Build relationships with local business communities and organizations. Provide access to business information resources and promote library spaces and services to home-based businesses and local entrepreneurs.
11. Facilitate the use of library spaces by community agencies to address the needs of vulnerable populations.
12. Effectively communicate the library's impact to local government leaders and partners.



Kingston Frontenac Public Library, Sharbot Lake branch

### 3. Definitions

**Guidelines** define a level of service or a preferred manner of delivering a service that can be measured and is adopted as a minimum target appropriate for all ARUPLO libraries. Guidelines are expressed as targets for a library to provide an appropriate level of service for its community. Examples of guidelines include size of library space, open hours per week, and number of items in a collection. It is important to note that what is presented here are guidelines and not standards. Standards are mandatory and imply active monitoring and some form of sanction for not meeting them. Guidelines are discretionary and outline recommended ways to provide service within measurable categories.

Application of these guidelines is important for internal planning purposes and also to serve as a benchmarking tool relative to other systems.

**Best practices** describe an optimal level of service or manner of providing services that may or may not be measurable. In addition, it is acknowledged that unique local circumstances may affect the validity or importance of a best practice and they may not apply to all library systems in every circumstance. Examples of best practices include space and staff allocations for services to special groups.

In earlier editions of the ARUPLO Guidelines, Guidelines and Best Practices were listed separately in the document. In this version they are combined within each guideline section for easier reference.

**\*Both Branch Definitions and Catchment Areas are recognized as problematic, and local circumstances and rationales that fit the community’s unique situation can override strict adherence to the guidelines.**

#### Branch Definitions

Many multi-branch systems serving rural areas seek creative ways to provide service to a variety of different communities. Service delivery options may be known locally as deposit stations, satellites, bookmobiles, book lockers, kiosks, among others. Service locations which fall significantly below guidelines may still be referred to locally as “public libraries” or “library branches”, in recognition of their long-standing status as such within the community. However, it is neither feasible nor desirable to try to create guidelines for solutions that attempt to address unique and local circumstances. Every library system will have to address its own rationale for the existence, creation, or “grandfathering” of such local solutions. **As a best practice, it is highly recommended that any such options be dealt with in the context of the system’s strategic planning process and articulated in a service delivery plan.**

**For purposes of this document, four types of branches have been identified:**

- Small Branches;
- Medium Branches;
- Large Branches;
- Urban Branches.

Each type can be determined by attributes including population size, local economic activity, and seasonal demand. It is up to each system to determine which branches it wishes to classify as small, medium, large or urban based on the strategic role that each branch plays within the system as a whole. Inability to meet one or more of the guidelines does not preclude it from being considered in a certain category if it meets most other guidelines.

Further, libraries may assign particular roles to specific branches, for example: functioning as a resource library to other smaller branches or a broader catchment population; hosting a makerspace or local history collection; or offering space for community partners’ outreach programming.



## Catchment Area / Population Served

The catchment area is the area from which users are drawn to a particular library service point. Catchment areas and the population contained therein can be determined by branch library surveys, census data, information from county or municipal offices, Canada Post postal code areas, and the information collected by school boards. Some libraries apportion the catchment population based on percentage of library cards affiliated with each branch, percentage of circulation of physical materials per branch, acknowledging that many borrowers use more than one branch or may use online resources exclusively.

The following are the general guidelines for branch catchment areas/population served:

### Small branches

Generally serve catchment areas of up to 5,000 population as determined by each system.

### Medium branches

Generally serve catchment areas of 5,000-10,000 population as determined by each system.

### Large branches

Generally serve catchment areas of 10,000-35,000 population as determined by each system.

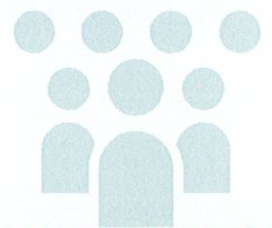
### Urban branches

Generally serve catchment area of 35,000 or more population as determined by each system.

Local considerations are a critical component of determining catchment area/population served and whether a branch is considered small, medium, large or urban.

## Examples of Local Considerations

- A branch may serve an immediate population of less than 10,000 people, thereby putting it in the medium category, but be considered a large branch by the system because it serves a strategic role such as having a larger collection, hosting system-wide functions such as inter-library loan or providing space for enhanced programming opportunities, Makerspaces, or non-traditional collections.
- Branches located in high tourist areas have an influx of visitors, whose needs must be supported, therefore their numbers need to be considered.
- Branches located in cottage country or popular rural areas may also have seasonal or weekend residents, who are not tourists, who also use the public library.
- Tie-ins between the library and economic development factors, e.g residents of neighbouring municipalities may in fact identify your branch's community as their "Community of Interest".
- A multi-branch system may have a mixture of types of branch within its member municipalities, with the strategic roles of each branch articulated in a service delivery model. The catchment area/population served of each branch therefore becomes less relevant against its unique strategic role and the relationships between branches within a "community of communities".





Huron County Library, Bayfield branch

## 4. Guidelines and Best Practices

### 4.1 Facilities

#### 4.1.1 Guidelines

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 is a general guideline for the range of size for each library type:

	Small	Medium	Large	Urban
Net library space square footage (s.f.)	2,500 – 5,000	5,000 – 10,000	10,000 – 35,000	35,000+

Branch size is also affected by components such as programs, special collections, and other add-on functions attributed to the branch by the library system, for example an enhanced role as a resource library to other branches or service areas. Space may also be shared space such as library and gallery, or library and arena, or library and system storage/administration. In these cases, net library space is the space allocated for library services including programming spaces in the library, collections, gathering areas, seating, staff areas, and library storage, etc.

Additional non-assignable space is required for public washrooms, utilities, stairwells, elevators, corridors, foyers, custodian, closets, mechanicals, etc., which will vary based on the type of building. This is generally allocated at 27-30% in addition to the above net space required.

## 4.1.2 Best Practices

### Space Allocation by Function

- User Seating: 5 user spaces per 1,000 capita @ 35 s.f. per user space
- Children's Area: self-contained area of 20 – 30% of the library's assignable area
- Teen Area: 10% of the library's assignable area
- Staff work space: 15% of the library's assignable area

Generally, the facility should be large enough to provide at least 1 s.f. of assignable space per population served or is projected to serve beyond minimum guidelines (e.g. if the catchment area is or will be 20,000 people, the facility should be 20,000 sq. ft. minimum).

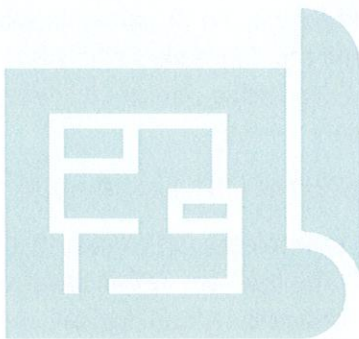
Additionally, this calculation accounts for flexibility of type of space and seating, as well as providing more buffer space between individuals.

### Branch Location

Members of the public travel no more than 30 minutes in a motorized vehicle under normal driving conditions to access basic library services offered by their municipal library system or by another municipal library system with reciprocal borrowing.

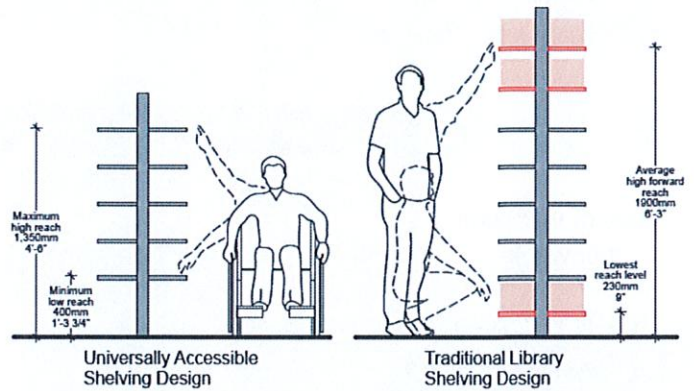
### Flexible spaces

With the growing need for meeting spaces and creative and collaborative spaces, library spaces should be as flexible as possible to allow for reconfigurations as needed. This should guide the choice of furnishings and equipment (e.g. mobile shelving which can be moved by staff for programming flexibility) as well as space design.

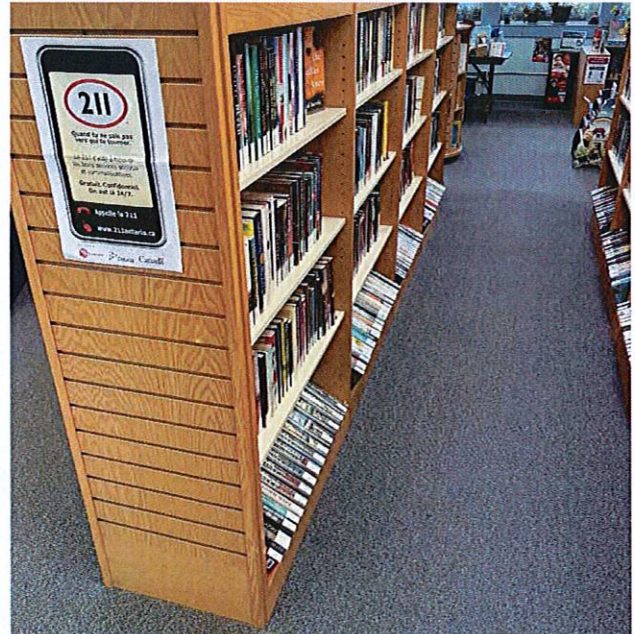


### Universal Accessibility

Branch libraries should strive to be as accessible as possible, not only to meet the requirements of the the *Accessibility for Ontarians with Disabilities Act*, but in the spirit of providing welcoming space for everyone, such as families with strollers, individuals with low vision, mobility issues, etc. The following diagram demonstrates enhanced accessibility in shelving design.



Libraries can also address ease of access with sloped lower shelves as illustrated in the following photo.



Shelving should be no more than 60 inches high and have electrical wiring on end caps for enhanced wayfinding/ installation of OPACs.



## 4.2 Hours of operation

### 4.2.1 Guidelines

Public libraries operate in a 24/7 environment. The hours of operation for a system, including virtual hours, have to begin to approximate a 24/7 model to meet public expectations. Improved 24/7 service can be accomplished through virtual library services, online resources, and outdoor access to Wi-Fi at library locations.

The single greatest barrier to library use as reported in community needs assessments is open hours of operation. Staffed library hours of operation must be available in order for a library to provide an enhanced mandate of government services provision, information and technology assistance, literacy-based programming, and community gathering place. Library hours should be allocated to meet community needs. Minimum hours of operation by library type for a staffed “bricks and mortar” library are as follows:

	Small	Medium	Large	Urban
Hours of operation per week	20-25 over 4 days per week	25-45 over 5 days per week	45-65 over 6-7 days per week	65 + over 7 days per week

### 4.2.2 Best Practices

The library will consider creative ways of increasing hours (for example, after-hours enabled access using self-serve technology) for people whose needs cannot be served during traditional open hours.

## 4.3 Staff

### 4.3.1 Guidelines

With increasing public expectations, technology-based services and operations, and the rapid pace of change in library services, all library staff positions require formal library education and training. The guidelines indicate both the minimum number of staff and their professional qualifications. 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 library system providing a full range of library services. In addition to meeting public service needs, consideration must be given to staff safety concerns such as working alone and the need to provide off-desk administrative time.

#### Definitions:

Professional librarians are defined as having a Master’s degree in library/ information science from an accredited university.

Library technicians are defined as having a diploma in library techniques from a community college.

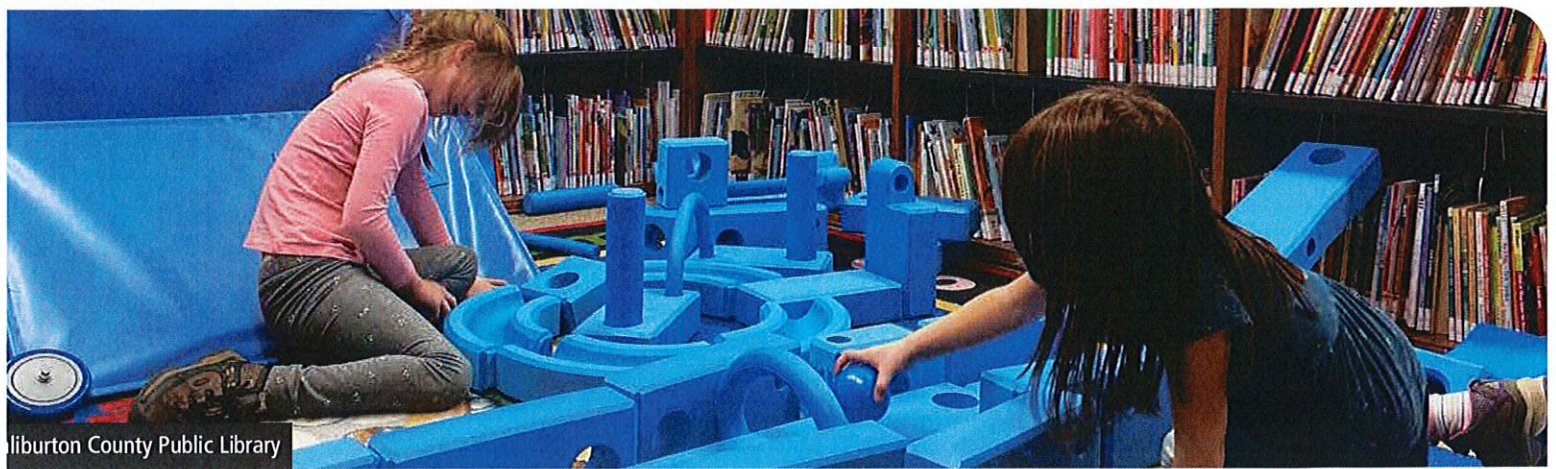
The EXCEL Certificate in Managing a Small Public Library is an online program for library workers without formal library training who wish to acquire core skills in all areas of public library service. It is administered by the Ontario Library Service.

The Advancing Public Library Leadership (APLL) Institute is a combination of in-person and virtual sessions for library CEOs, managers, and aspiring leaders who wish to expand their organizational leadership capacity. It is administered by the Ontario Library Service.

FTE = Full-time equivalent. (35 hours per week)

Each library system has professional librarians that are used on a system-wide basis. This helps ensure that branches receive equitable access to resources, reduces duplication, and relieves workspace pressures by centralizing some functions.





	Small	Medium	Large	Urban
Staff complement (FTE)	1 – 2.5	2.5 – 5	5 – 17.5	17.5 +
Qualifications of Branch Supervisor	Library competency, e.g. post-secondary plus EXCEL, Library Techniques	Professional Librarian and APLL or other public administration certification	Professional Librarian and APLL or other public administration certification	Professional Librarian and APLL or other public administration certification
Qualifications of other staff		Paraprofessional qualifications relevant to the requirements of the position	2 additional professional librarians or a combination of additional professional librarians and/or appropriate paraprofessionals, relevant to the requirements of the positions	2 additional professional librarians or a combination of additional professional librarians and/or appropriate paraprofessionals, relevant to the requirements of the positions

### 4.3.2 Best Practices

Given the complexities of managing multi-branch library systems, it is recommended that the CEO hold an MLIS degree or equivalent, and in addition to that, further training such as APLL and/or other public administration certification is highly valued.

In accordance with the service levels of each category of branch, administrative time should be included in the staffing FTE, to allow for the completion of duties not able to be accomplished while providing direct public service during branch open hours. As an example, for every 20 hours scheduled on-desk, up to an additional 20% (or 4 hours) is allotted for branch administrative duties.

The library encourages and provides opportunities for continuing education and training for its staff and makes provision for this in its policy, its long-range plan, and in its professional development budget to an amount not less than 1% of the total staff budget (e.g. by providing any of in-house training programs, financial or other support for staff to enroll in the EXCEL Certificate, APLL, and to attend library conferences and other training programs and events). Staff wages for training are not included in the professional development budget. Cross functional, system-wide training is recommended for all staff.

## 4.4 Collections

### 4.4.1 Guidelines



An appropriate collection is a broad and diverse variety of materials offering equitable access to ideas and information. Each library's collection practices remain responsive to specific community needs.

Collection materials include a variety of physical, print and digital formats, and system-wide electronic resources. Resources are shared among branches:

- Every library system has a delivery system in place to move items from one location to another.
- Every library system has Collection Exchange procedures to refresh branch collections for browsing. This may consist of regular exchanges, or floating or rotating collections.

#### Collection size:

Many libraries are decreasing the size of their physical collections. Reasons for this include but are not limited to:

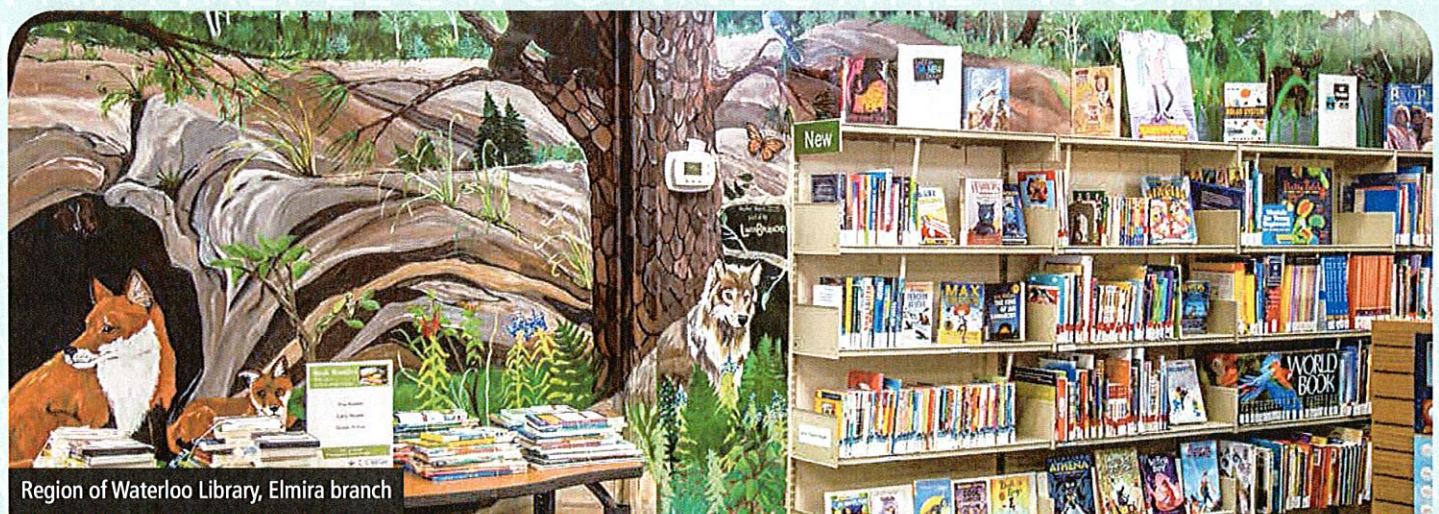
- growing use of and demand for digital resources;
- downward trends in use of print and A/V collections;
- publishing trends including rising costs of print materials;
- need to repurpose collection space for other library functions;
- replacement of shelving to comply with accessibility standards resulting in decreased capacity.

In spite of these trends, physical or print publications will continue to be an important component for ARUPLO communities.

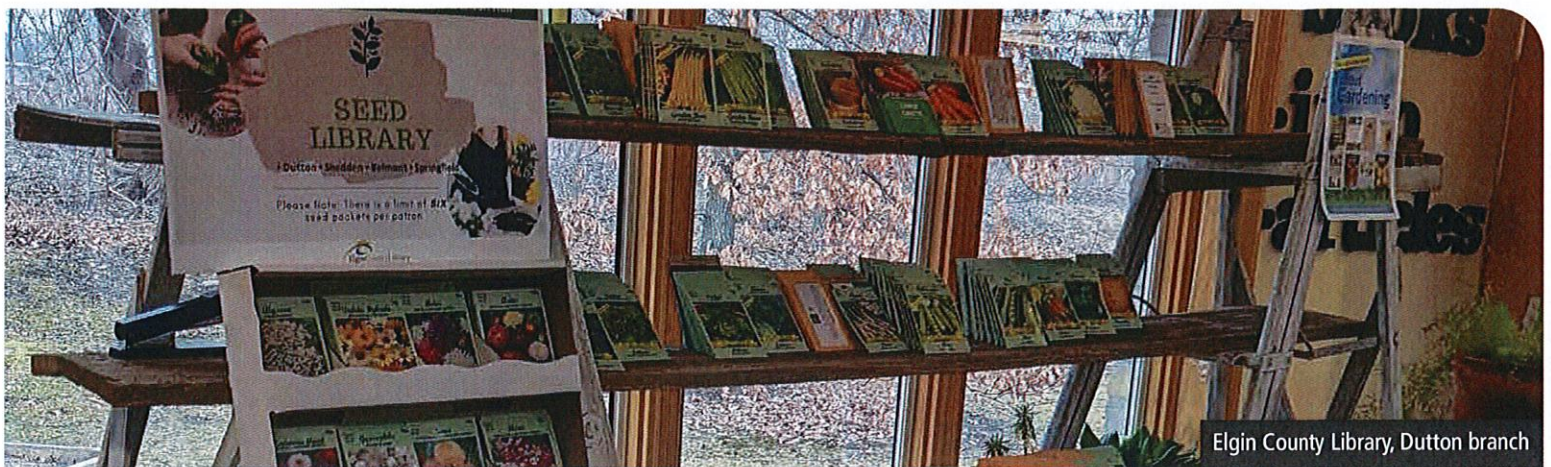
Alternate collections (e.g. Library of Things) are not included in this Guideline given their larger space requirements and the common practice of storing such items centrally. However, each branch and central location should be prepared to store, promote, and grow their Library of Things with content and collections specific to their local communities' needs and interests. As a growing trend in library services, these needs should be monitored locally and be included within Strategic Planning.

The guidelines refer to the number of Print and A/V items located at each branch.

Small	Medium	Large	Urban
6,000 – 12,000	12,000 – 24,000	24,000 – 50,000	50,000 +



Region of Waterloo Library, Elmira branch



## 4.4.2 Best Practices

- **Adult/Children mix of Print and A/V:** In general, two-thirds of a branch library collection consists of adult material with one-third consisting of children's and young adult material.
- **Online and Alternate Collections:** A minimum of 25% of the acquisitions budget is spent on non-print formats including E-Collections, online databases and multi-media.
- **Acquisitions:** Each branch has an up-to-date collection, with a minimum of 50% of the materials purchased or published within the last five years.
- **Shared or Consortial Collections:** In order to provide the best possible access to digital resources, libraries participate in shared or consortial E-Collections.
- **Resource Sharing:** Library users receive requested items identified as available within another branch in the library system within 3 – 5 working days.

## 4.5 User Seating

### 4.5.1 Guidelines

User seating should be flexible and interchangeable to meet community needs. This includes seating for reading and independent work as well as collaborative activities, and seating for computer use, both library workstations and seating for Wi-Fi-enabled use of patrons' devices. Seating for separate meeting/conference rooms is not included in this guideline.

A general rule of thumb for barrier-free seating is that all libraries should provide some barrier-free seating of at least two units up to 80 seats, and 3% of the seating capacity with over 80 seats.

The guideline for the number of seats, including computer seating, is an intentionally broad range, in recognition of the fact that specific branches will have different roles and service levels within their library system. In general, a branch may offer:

- fewer user seats if the branch encourages shorter visits for browsing; with a greater proportion of floor space required for collections;
- additional seats if the branch offers spaces for long-term uses such as individual and group study.

Number of seats, including computer seating:

Small	Medium	Large	Urban
12 – 30	30 – 60	60 – 200	200+



Oxford County Library, Tillsburg branch

## 4.6 Technology

### 4.6.1 Guidelines

#### Every library system should provide:

- access to an Integrated Library System which includes a public access catalogue of library holdings;
- an Internet presence that provides access to Web-based information sources (e.g. information about the library, library catalogue, virtual reference services, government and municipal information, community information, links to other library collections, on-line databases, etc.), and trained staff to assist the public in the effective use of these information sources;
- an active social media presence;
- access to emerging technologies and maker technology;
- digital literacy education programs to develop staff's and the public's digital competencies.

#### Each library branch should provide:

- the very best Internet service that is available;
- in-branch access to workstation hardware appropriate to that branch's needs;

- indoor and outdoor Wi-Fi for public use;
- access to training in how to use the electronic resources, technology, and alternate resources offered by the library;
- the ability for the user to duplicate (copy, print, etc.) from the Internet or online content or images;
- appropriate technical infrastructure to support the full range of staff operations;
- access to reliable telephone service (e.g. cellular or landline).

### 4.6.2 Best Practices

As a minimum threshold, each branch should have three public access workstations or a combination of PAC workstation and device stations.

The number of public access computers/device stations required will depend on each branch community's level of access to computer technology and Internet service, and the prevalence of patrons' use of their own devices in the branch.

## 5. Summary of Guidelines by Branch Type

	Small Minimum Range		Medium Minimum Range		Large Minimum Range		Urban Minimum Range
Net library space	2500 s.f.	5,000 s.f.	5,000 s.f.	10,000 s.f.	10,000 s.f.	35,000 s.f.	35,000 s.f.
Hours of operation per week	20	25	25	45	45	65	65+
Number of days per week	4	4	5	5	6	7	7+
Staff Complement	1 FTE	2.5 FTE	2.5 FTE	5 FTE	5 FTE	17.5 FTE	17.5+ FTE
Qualification of Branch Supervisor	Library competency, e.g. post-secondary plus EXCEL, library techniques.		Professional librarian and APLL or other public administration certification		Professional librarian and APLL or other public administration certification		Professional librarian and APLL or other public administration certification
Qualification of Other Staff			Paraprofessional qualifications relevant to the requirements of the position		2 additional professional librarians or a combination of additional professional librarians and/or appropriate paraprofessionals, relevant to the requirements of the positions		2 additional professional librarians or a combination of additional professional librarians and/or appropriate paraprofessionals, relevant to the requirements of the positions
Number of items in physical collection	6,000	12,000	12,000	24,000	24,000	50,000	50,000
User seating	12	30	30	60	60	200	200
Computers	3		3		3		

# Appendix A • Sample of Branch Space Guidelines

## Branch Space Guidelines

1. This spreadsheet can be used for planning purposes for new or renovated branch libraries and adjusted to meet local needs.

Component	Small		Medium		Large		Urban
	Minimum Range		Minimum Range		Minimum Range		Minimum Range
<b>Collections</b>							
Collections @ 7 vol/s.f. (.14 per vol.)	840	1,680	1,680	3,360	3,360	7,000	7,000
Local history		100	100	200	200	400	400
<b>Public Service Areas</b>							
User seating* @ 35 s.f. ea.	420	1,050	1,050	2,100	2,100	7,000	7,000
Public computers* @ 35 s.f.	105	105	105	105	105	105	105
Program Room(s)		450	450	750	750	1,500	2,000
Meeting Room(s)				200	200	400	400
Study Room(s)		100	100	200	200	400	400
Maker Space(s)		100	150	300	300	500	500
<b>Staff Service Areas</b>							
Service/circulation desk(s)	175	250	250	350	350	500	500
Work room	200	300	300	500	500	800	800
Storage	100	150	150	200	200	300	300
Branch Manager's office			150	150	150	150	150
Other Professional offices						100	200
Staff lunchroom and lockers	100	100	100	200	200	350	350
Staff washroom (barrier-free)	150	150	150	150	150	150	150

Areas highlighted refer directly to ARUPLO Guidelines.

\* Program rooms and meeting rooms can be variously configured with dividing walls, and should include kitchenette facilities and their own storage areas for furniture and A/V equipment.

Components total	2,090	4,535	4,735	8,765	8,765	19,655	20,255
"Per-capita approach, for comparison (net)"	2,500	5,000	5,000	10,000	10,000	35,000	35,000

Both the Components Approach and Per Capita Approach would require 27 - 30% additional space for non-assignable use.

## Reference Sheet for Branch Space Guidelines

	Small		Medium		Large		Urban
	Minimum Range		Minimum Range		Minimum Range		Minimum Range
Number of items in physical collection	6,000	12,000	12,000	24,000	24,000	50,000	50,000
User seating	12	30	30	60	60	200	200
Computer seating	3	3	3	3	3	3	3

### Branch Space Guidelines

**Libraries should consider their specific needs when developing or assessing the requirements for each branch library.** The space requirements (unit sizes) used are the consultants' and architect's recommendations based on experience and barrier-free access. They were originally taken from the book, *Making the Case for Your Library Building Project*, published by the Southern Ontario Library Service in 2010, [https://resources.olservice.ca/ld.php?content\\_id=34842770](https://resources.olservice.ca/ld.php?content_id=34842770) and subsequently updated to reflect current library trends and barrier-free requirements and goals.

Area	Unit Sizes (s.f.)	Notes
Collections	0.14	Blended collections. Accessible shelving.
User seating	35	Blended seating, assuming a mix of lounge and desk. Some might need 40 s.f. for barrier free.
Program Room	15 per user	Minimum to accommodate a class of 30 students. May also include kitchenette and storage.
Group study room	165	1 table and 6 chairs
Additional spaces	Unit Sizes (s.f.)	Also to consider Library Café, Friends' book shop, literacy centre, maker spaces, etc.
Staff service/circ	175 per staff	Emerging trend for a smaller service desk, roaming staff, self check-out stations.
Workrooms	100	Assumes some tech and support services provided by admin offices elsewhere. Includes private offices as required.
Staff lunchroom	35 per staff	Branch libraries may have several part-time staff, need to plan for not just FTE.
Non-assignable spaces	27%	Corridors, foyer, waiting areas, public washrooms, including universal. Loading areas, garbage, recycling, custodian, storage, closets. Wall thicknesses, building services, chases, mechanical. Assumes single storey building, FADS standards.





Wellington County Library, Hillsburgh branch

## Appendix A • Additional Resources

Planning documents are available to assist with ensuring public libraries meet their local needs. Some examples of these documents follow, in no particular importance or order. Documents retrieved April 2023.

Ontario Public Library Guidelines Monitoring and Accreditation Council. *Ontario Public Library Guidelines*. Updated annually. <https://ontariopubliclibraryguidelines.ca/>

Southern Ontario Library Service. *Making the Case for Your Library Building Project*. 2010. [https://resources.olservice.ca/ld.php?content\\_id=34842770](https://resources.olservice.ca/ld.php?content_id=34842770)

City of Brantford, *2010 Facility Accessibility Design Standards*. <https://www.brantford.ca/en/business-and-development/resources/Documents/Facility-Accessibility-Design-Standards-FADS.pdf>

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Wellington County Library, Hillsburgh branch

## Acknowledgments

This document was developed by the [Administrators of Rural and Urban Public Libraries of Ontario \(ARUPLO\)](#), representing twenty public library systems consisting of rural and urban branch libraries serving hundreds of communities with a population of over 1.5 million people.


Representatives of these public library systems completed a survey of how they have used the ARUPLO Guidelines in the past and participated in an all-day workshop to develop this fourth edition.

The Steering Committee consisted of Brian Masschaele (Elgin County Library), Tania Sharpe (Chatham-Kent Public Library) and Sabrina Saunders (Blue Mountains Public Library). Beth Ross and Lisa Miettinen were the consultants, assisted by Jason Morgan, President and Senior Architect, Allan Avis Architects.



**“Wellington County prides itself on its beautiful library spaces. The ARUPLO guidelines have proven to be a key resource to us whether we are renovating an existing building or building a new one.”**

**Wellington County Library Board**



MORROW. LEARN. LEAD. PARTNER. D  
LITATE. SUPPORT. ENCOURAGE. ME  
SPIRE. CHANGE. TARGET. EVALUAT  
LECT. CONNECT. NETWORK. BORRO  
UILD. SUSTAIN. ACCESS. FACILITATI  
OLLECT. HOST. HELP TEACH. INSPIRE

**APPENDIX B**

Lease Agreement Template

# LEASE AGREEMENT

THIS LEASE AGREEMENT (this “Agreement”) made as of this [redacted] day of [redacted], 2024 (the “Effective Date”).

BETWEEN:

**(Name of Municipality/Township)**, hereinafter referred to as “the Lessor”

-and-

**The Stormont, Dundas and Glengarry County Library Board** hereinafter referred to as the “Library”

**WHEREAS** the Lessor is a duly incorporated local Municipality in the province of Ontario, incorporated pursuant to the *Municipal Act*, 2001 R.S.O. 2001 c. M. 25 (the “Municipal Act, 2001”), and subject to all legislation and regulations, as amended from time to time, applicable to such corporations;

**WHEREAS** the Library is a County Library Board, which is a corporation established pursuant to the *Public Libraries Act*, R.S.O. 1990, c.P.44, and subject to all legislation and regulations, as amended from time to time, applicable to such corporations;

**WHEREAS** the Lessor and the Library wish to provide and maintain public library services in (community) for the benefit of library users within the United Counties of Stormont, Dundas and Glengarry.

**NOW THEREFORE**, in consideration of the rents, covenants, and agreements contained herein, the Lessor and the Library agree as follows:

## 1. PREMISES

In consideration of the rents, covenants and agreements of the Library to be paid, observed and performed, the Lessor hereby leases the Library the Lease Premises as more particularly defined in Schedule “A” attached hereto (the “Leased Premises”), which shall include the legal description of the Property, the site location, and the approximate square footage of the Leased Premises for the purposes of Rent (as defined below).

## 2. TERM

This Agreement will be in force for a term of five (5) years, commencing January 1, 2024 (the

“Commencement Date”). Either party may give notice to terminate this Agreement by providing ninety (90) days written notice to the other.

### **3. OVERHOLDING**

If the Library continues to occupy the Leased Premises after the termination of this Agreement, with the consent of the Lessor, and without any further written Agreement, the Library shall be a yearly tenant.

### **4. RENT**

The Library will pay to the Lessor an annual rental fee calculated at a rate of \$10.04 per square foot of usable interior area, exclusive of applicable taxes. The annual rent paid for each subsequent year of the term of the Agreement shall be subject to an Annual CPI Adjustment.

“Annual CPI Adjustment” means an annual adjustment, to the amount of the annual rent compared to the previous year, in an amount equivalent to the increase, if any, to the rate of inflation as determined by the Statistics Canada – Consumer Price Index, monthly, not seasonally adjusted, Ontario – all items (Table 18-10-0004-01).

The Annual CPI adjustment shall be calculated based on the change in the average CPI over the two preceding years, from January to December of each year. The Annual CPI Adjustment shall be applied retroactively to January 1<sup>st</sup> of each year of this Agreement beginning in 2025.

### **5. INSURANCE**

Each party, at their own expense shall maintain insurance requirements for the duration of the agreement as noted below:

Municipal Liability issued on an occurrence basis for an amount of not less than \$5,000,000 per occurrence / \$5,000,000 annual aggregate for any negligent acts or omissions relating to their obligations under this Agreement. Such insurance shall include but is not limited to bodily injury and property damage including loss of use; personal injury; contractual liability; premises, property & operations; non-owned automobile; broad form property damage; products & completed operations; owners & contractors protective; occurrence property damage; employees and volunteers as Additional Insured(s); contingent employers liability; tenants legal liability cross liability and severability of interest clause.

The *Lessor* shall add the United Counties of Stormont, Dundas & Glengarry (the “Counties”) and the Library as Additional Insured, subject to a waiver of subrogation. This insurance shall be non-contributing with and apply as secondary and not as excess of any insurance available to the Counties and the Library.

The United Counties of Stormont, Dundas & Glengarry and the Library shall add the *Lessor* as Additional Insured subject to a waiver of subrogation. This insurance shall be non-contributing with and apply as primary and not as excess of any insurance available to the *Lessor*.

Each party shall be responsible for the physical damage to their property used in providing services as outlined in the agreement.

Any applicable Deductible to any insurance coverage shall be the sole responsibility of the Named Insured and the additional Insured shall bear no cost towards such deductible.

Each party shall provide the other parties with a certificate of insurance evidence of the above noted coverage including a 30-day notice of cancellation.

In addition to General Insurance, each party shall provide evidence of WSIB or its equivalent.

## **6. GENERAL PROVISIONS**

The Library covenants with the Lessor:

- a) To use the facilities only for the purpose of the SDG Library and other uses consistent with the objectives of the Library and for no other purpose;
- b) To be solely responsible for the legal governance (supervision, financial costs, standards of practice and liability) of its staff;
- c) To comply with all federal, provincial and municipal laws, rules, regulations and by-laws, and to hold the Lessor harmless from the consequences of its failure to do so;
- d) Amendment to this Agreement shall be permitted only in writing, approved and executed by duly authorized officers of each of the Parties hereto;
- e) If any clause or parts thereof in this Agreement are determined to be unenforceable, they shall be considered separate and severable from the Agreement and the remaining provisions of the Agreement shall remain in full force and effect.

## **7. COVENANTS OF THE LIBRARY**

The Library shall:

- a) Maintain and provide public library services at the premises supplied by the *Lessor* for the benefit of library users;
- b) Provide custodial services required for the general maintenance of the premises exclusively used by the Library;
- c) Report, in writing, any broken or damaged or non-functioning infrastructure equipment immediately to the Lessor;
- d) Maintain all Library owned equipment in safe and good repair at its own expense;
- e) Replace, at its own expense, any costs associated with painting and flooring;
- f) Gather all refuse, litter, garbage or loose material in a central location for removal, as per Schedule C;
- g) Not alter, demolish, add to, reconstruct, or in any way vary the facility without first having obtained the consent, in writing of the Lessor, which consent may be withheld without cause or reason. It is understood that the Library houses within the facility moveable equipment such as furniture, computers, shelves, and other movable

equipment for the purpose of business operations and may replace, add to, or remove such items at their discretion;

- h) Acknowledges that all requests for facility repairs, replacements or improvements are subject to the final approval of the Municipal Council.

## **8. COVENANTS OF LESSOR**

The *Lessor* shall:

- a) Provide ongoing maintenance and repair of the Leased Premises and the Property, ensuring that they are maintained to the same quality as the original work, including but not limited to the tasks outlined in Schedule "B";
- b) Provide garbage, recycling and winter snow removal services in accordance with Schedule "C";
- c) Manage the ongoing maintenance of the grounds (exclusive of the gardens), parking and building access areas (on which the premises is located);
- d) Maintain the elevator in the Leased Premises (if applicable);
- e) Provide custodial services required for the building, other than the space used for library purposes;
- f) Upon satisfactory review by the Lessor, permit the placement of appropriate signage on the exterior and interior of the building in a manner that is consistent with all other Lessor signage and in accordance with the Lessor's sign by-law;
- g) Provide an outdoor salt storage bin (with scoop), in a location easily accessible and adjacent to the Leased Premises' door and walkway. The bin shall be stocked with a deicer compound (not rock salt) for the use of deicing sidewalks and walkways;
- h) Have the right to enter and conduct periodic inspections of the premises, viewing the state of maintenance and repair;
- i) Have the right to coordinate and carry out any maintenance deemed necessary from the site inspections.

## **9. INDEMNIFICATION**

The *Lessor* covenants and agrees to defend, indemnify and save harmless the United Counties of Stormont, Dundas & Glengarry and the Library their elected officials, officers, employees and volunteers from and against any and all claims, actions, losses, expenses, fines, costs (including legal costs), interest or damages of every nature and kind whatsoever, including but not limited to bodily injury or to damage to or destruction of tangible property including loss of revenue arising out of or allegedly attributable to the negligence, acts, errors, omissions, whether willful or otherwise by the *Lessor*, their officers, employees, agents, or others who the *Lessor* is legally responsible, in respect to this Agreement. This indemnity shall be in addition to and not in lieu of any insurance to be provided to the County and the Library in accordance with this Agreement and shall survive this Agreement.



The United Counties of Stormont, Dundas & Glengarry and the Library, covenants and agrees to defend, indemnify and save harmless the *Lessor*, their elected officials, officers, employees and from and against any and all claims, actions, losses, expenses, fines, costs (including legal costs), interest or damages of every nature and kind whatsoever, including but not limited to bodily injury or to damage to or destruction of tangible property including loss of revenue arising out of or allegedly attributable to the negligence, acts, errors, omissions, whether willful or otherwise by the County and the Library, their officers, employees, agents, or others who the County and the Library are legally responsible, in respect to this Agreement. This indemnity shall be in addition to and not in lieu of any insurance to be provided to the *Lessor* in accordance with this Agreement and shall survive this Agreement.

IN WITNESS WHEREOF the parties hereto have executed this Agreement under signature of their duly authorized officers on the date set forth:

THE CORPORATION OF THE MUNICIPLITY OF XXXXXXXX (the "Lessor")

PER: \_\_\_\_\_

Name:

Title:

PER: \_\_\_\_\_

Name:

Title:

*We have authority to bind the Lessor*

THE STORMONT, DUNDAS AND GLENGARRY COUNTY LIBRARY BOARD (the "Library")

PER: \_\_\_\_\_

Name:

Title:

PER: \_\_\_\_\_

Name:

Title:

*We have authority to bind the Library*

## SCHEDULE "A"

### 1. Legal Description

[ENTER LEGAL DESCRIPTION]

### 2. Site Location

[ENTER SITE LOCATION]

### 3. Approximate Square Footage of Leased Premises

[ENTER APPROXIMATE SQUARE FOOTAGE OF LEASED PREMISES]

## SCHEDULE "B"

### 1. Repair and Maintenance

As per Section 7a), the Lessor's specific responsibilities, at its own cost and expense shall include:

Service	Frequency
Performing all necessary building repairs and capital improvements within the building envelope	As required
Repairing and replacing the roof	As required
Repairing and maintaining the exterior façade of the Building	As required
Replacing plumbing, heating, lighting, water and ventilation systems and conducting major repairs	As required
Replacing broken windows	As required
Cleaning the exterior façade and windows	Annually, or at the discretion of Library staff
Replacing light fixtures (including the ballasts)	As required
Conducting pest control measures	Monthly
Inspections of fire extinguishers and emergency lighting	Annually
Maintaining smoke alarms and other fire safety systems in proper working condition	As required
Supplying electric power, water and sewer charges, heat and air conditioning	Daily
Performing regular elevator maintenance (if applicable)	As required

### 2. Accessibility

The Lessor and the Library acknowledge the importance of accessibility in the Leased Premises. The Lessor shall ensure that the Leased Premises comply with all applicable laws, regulations, and standards related to accessibility for individuals with disabilities, including but not limited to the *Accessibility for Ontarians with Disabilities Act, 2005 (AODA)*. The Lessor shall take all reasonable steps to make the Leased Premises accessible for individuals with disabilities, including but not limited to providing accessible parking, washrooms, entrances, and other facilities. The Lessor shall bear all costs associated with making the Leased Premises accessible. The Library shall cooperate with the Lessor in making the Leased Premises more accessible, including but not limited to granting access to common areas and providing reasonable accommodation for construction and renovation. The Lessor shall keep the Library informed of its progress in making the Leased Premises more accessible and shall promptly notify the Lessor of any issues or concerns related to accessibility.

**SCHEDULE "C"**

**1. Site Specific Services**

As per Section 7a), the Lessor's specific responsibilities, at its own cost and expense shall include:

<b>SDG Library – [ENTER BRANCH NAME]</b>	
Garbage Removal	[ENTER SITE SPECIFIC INFORMATION]
Recycling Removal	[ENTER SITE SPECIFIC INFORMATION]
Snow Removal	[ENTER SITE SPECIFIC INFORMATION]
Deicer	[ENTER SITE SPECIFIC INFORMATION]
<b>SDG Library – [ENTER BRANCH NAME]</b>	
Garbage Removal	[ENTER SITE SPECIFIC INFORMATION]
Recycling Removal	[ENTER SITE SPECIFIC INFORMATION]
Snow Removal	[ENTER SITE SPECIFIC INFORMATION]
Deicer	[ENTER SITE SPECIFIC INFORMATION]
<b>SDG Library – [ENTER BRANCH NAME]</b>	
Garbage Removal	[ENTER SITE SPECIFIC INFORMATION]
Recycling Removal	[ENTER SITE SPECIFIC INFORMATION]
Snow Removal	[ENTER SITE SPECIFIC INFORMATION]
Deicer	[ENTER SITE SPECIFIC INFORMATION]

**ACTION REQUEST**

<b><u>PREPARED BY:</u></b>	Rebecca Luck – Director of Library Services
<b><u>PREPARED FOR:</u></b>	SDG Library Board
<b><u>LIBRARY BOARD DATE:</u></b>	May 23, 2024
<b><u>SUBJECT:</u></b>	Communications Policy - Review

**BACKGROUND:**

1. The Communications Policy sets out a framework to provide effective and coordinated ways of communicating with the public, including patrons, community groups and partners, and the media.
2. The Communications Policy was first approved by the Board in April 2008, and was last reviewed October 2014.

**ANALYSIS:**

3. It is recommended that the Policy be amended to include the following:
  - a. Incorporating a policy guideline, outlining the values and goals of communication strategies of the SDG Library, including what it will not condone.
  - b. Expanding on the role of social media as part of the SDG Library. This includes an expanded framework on appropriate content for staff and risk management.
  - c. Addition of crisis and emergency communication.

**IMPACT ON 2024 BUDGET:**

4. N/A

**ALIGNMENT WITH STRATEGIC PLAN:**

Goal 2: Conduct Community Outreach

**RECOMMENDATION(S):**

That the Stormont, Dundas, and Glengarry County Library Board approve the Communications Policy, as presented.



# Communications Policy

**For:** The Stormont, Dundas and Glengarry  
County Library Board

**Policy No.:** 2008-01

**Policy Type:** Operational

**Effective Date:** May 23, 2024

Date of Last Revision: October 16, 2014

First Approved: April 30, 2008

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## **Purpose:**

The Stormont, Dundas and Glengarry County Library takes an active role in communicating the value and importance of public library services to the community. This policy provides guidelines for an effective and coordinated way of communicating with the public, including patrons, community groups and partners, and the media.

## **Scope:**

This policy refers to:

- a) External communication about or on behalf of SDG Library;
- b) Communications by SDG Library Board members and SDG Library staff;
- c) All forms of communication, including all online communication platforms such as social media.

## **Definitions**

**Communications:** the interaction between two or more people or groups where information and other content is provided, sent, or received.

**Communications platform:** a tool that supports two-way communication such as conversations, information sharing and commentary.

## **Policy guidelines:**

The SDG Library values the role that communications play in:

- a) Engaging and consulting with the community and members of the public;
- b) Sharing information about the Library;
- c) Enhancing the value the library brings to the community;
- d) Providing transparency about how the Library operates.

The Library's communication will:

- a) Reflect the Library's values and its commitment to public service;
- b) Be delivered clearly and effectively in a respectful and positive manner;
- c) Support intellectual freedom while protecting privacy rights;
- d) Represent the diverse nature of the community in a fair and inclusive manner;
- e) Reflect the value of accessibility and comply with the requirements of the Accessibility for Ontarians in Disabilities Act (AODA) and regulations;

# Communications Policy

- f) Provide information in different formats using various means of communication to efficiently reach audiences;
- g) Be delivered in a proactive, not reactive manner.

The Library will not condone:

- a) Promotion of discrimination, stereotypes, socially unacceptable behaviour, gratuitous violence, obscene or profane language or unfair representation;
- b) Exploitation or inciting of violence; or directly encourage or exhibit obvious indifference to, unlawful or reprehensive behaviour;
- c) Demean, denigrate, or disparage any identifiable person, group of persons, organization, profession, product or service;
- d) Advertising that is partisan or political in nature;
- e) The promotion of religious beliefs or convictions;
- f) Personal ads and notices, and notices of items for sale or rent.

The Communications and Marketing Coordinator will:

- a) Establish graphics standards and guidelines and ensure adherence to the Library's brand identity;
- b) In consultation with the Director of Library Services, establish guidelines for all public, Board, and staff communications;
- c) Develop and ensure the implementation of a Communications and Marketing Plan that will be reviewed annually by the Library Board.

## **Media Communication:**

SDG Library recognizes the value and impact that local news media offer to SDG Library in helping to share information about Library programs and services to the community. Inquiries from news media are given high priority by SDG Library. Requests for information will be responded to effectively and efficiently and in as timely a manner as possible.

The Communications and Marketing Coordinator, or designate, will respond to media inquiries and, at their discretion, refer any item to the Director of Library Services and/or the Board Chair.

## **Website:**

SDG Library will keep information on its website current and accessible.

## **Social Media:**

The SDG Library will maintain various social media applications to enhance the communication of Library information within the community. These will be in keeping with



# Communications Policy

the Communications Policy outlined above. Use of the Library's social media applications will be a part of the Communications and Marketing Plan, and present meaningful and honest ideas that are of interest to Library users and non-users alike, and invite responses from the social media community.

SDG Library staff and board members are free to publish or comment via social media in accordance with this policy. SDG Library staff are subject to this policy to the extent they identify themselves as SDG Library employees.

Appropriate content for staff to post includes, but is not limited to:

- a) Notices of upcoming meetings, programs and events;
- b) Content of all press releases, policies and procedures, information about library services, collections, trends or technology, reviews and recommendations;
- c) Communication between staff and the library community regarding SDG Library work and/or projects;
- d) Frequently asked questions;
- e) Promotion and outreach;
- f) Information relevant to the community, information from community partners, local employment, training, and continuing education information.

The SDG Library has created risk management protocols and procedures in the event of an online and social media incident. Should an incident or issue occur, SDG Library will respond appropriately in a timely manner. This includes an investigation into the matter and action as deemed appropriate, which may include one or more of the following:

- a) Issuing a response, correction or apology;
- b) Deleting a comment or post;
- c) Investigating similar or related incidents to prevent repeat incidents;
- d) Pursuing legal advice and/or action;
- e) Applying the Rules of Conduct Policy in order to exclude patrons from use of Library facilities, depending on the seriousness of the incident;
- f) Applying human resources procedures, including disciplinary action up to and including dismissal;
- g) Reviewing incidents after the fact to determine if preventive measures or the SDG Library's response could be improved.

Comments, posts, and messages are welcome on SDG Library social media sites provided they do not contain:

- a) Obscene, racist, or otherwise discriminatory content;
- b) Personal attacks, insults, or threatening language;
- c) Plagiarized material or copyrighted material;
- d) Confidential information published without prior consent.



# Communications Policy

Postings containing any of the above will be removed immediately, and the posting account may be blocked from posting subsequent messages to the Library's social media platform.

Being followed by SDG Library on any social media platform does not imply affiliation or endorsement.

## **Crisis and Emergency Communication:**

In the event of a crisis or emergency in which the Library is involved, SDG Library will:

- a) Communicate during and after the event in order to prevent injury or loss of life, limit damage to Library assets and property, maintain public services, assist in the process of recovery and maintain or restore public confidence in the Library;
- b) Support the SDG Counties and its Boards and Committees in any crisis or emergency communications, as required;
- c) The Chair of the Stormont, Dundas and Glengarry County Library Board and/or the Director of Library Services assumes the role of spokesperson for crisis or emergency communications. Other board members and staff will not act as spokespersons unless designated by the Chair or Director of Library Services.

## **Public Bulletin Boards:**

For information regarding public bulletin boards, please refer to the Facilities Use policy.

*Adapted from Chatham-Kent Public Library, Collingwood Public Library, and Markham Public Library.*



**ACTION REQUEST**

**PREPARED BY:** Rebecca Luck – Director of Library Services

**PREPARED FOR:** SDG Library Board

**LIBRARY BOARD DATE:** May 23, 2024

**SUBJECT:** Dalkeith Express Depot

**BACKGROUND:**

1. On September 3, 2016, the Dalkeith Library was closed. It was at this time that the Board approved to have a book return box to provide residents an alternative service delivery at the Dalkeith Branch location.
2. On February 29, 2024, SDG Library staff (Director of Library Services and Temporary District 3 Supervisor) met with Brenda Noble to complete a tour of Dalkeith Plus! (Dalkeith Library in Dalkeith, ON). The original intent of the site visit was to discuss the Library’s internet usage as well as discuss a short-term alternative for pick-up/drop-off hold requests.
3. Ms. Noble explained that the Dalkeith Library is run by volunteers. SDG Library staff were very impressed on how well the Library was set-up: their collection boasted nearly 10,000 books, two (2) public access computer stations, and tables set-up for programs.
4. On April 15, 2024, the Director of Library Services met with Jamie McDonald (Mayor of North Glengarry), Carma Williams (Deputy Mayor of North Glengarry), and Maureen Adams (SDG County CAO) to discuss the future of the Dalkeith Express Depot.

**ANALYSIS:**

5. Monthly reports have been compiled for the Dalkeith Express Depot documenting the number of patrons and items being utilized:

<b>2023</b>		
Month	No. of Patrons	No. of Items
June	2	2
July	3	3
August	6	6
September	4	5
October	3	5
November	6	4
December	1	3
<b>2024</b>		
January	2	2
February	2	2
March	3	3

April	0	0
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6. It should be noted that the patrons who use the Dalkeith Express Depot are also borrowers of the Alexandria Library.
7. As previously noted, the reason for the implementation of the Dalkeith Express Depot was to provide residents an alternative service delivery due to the closure of the Dalkeith Library. As can be seen from the table above, the Express Depot is being underutilized. As a comparison, during June to December 2023, Glen Walter circulated 278 items, and St. Andrews circulated 471 items.
8. Due to the success of the Dalkeith Plus!, and the service it provides to the residents of Dalkeith, an express depot may no longer be warranted.

**IMPACT ON 2024 BUDGET:**

9. An LSA completes a weekly visit (on Wednesdays) to the Dalkeith Express Depot to empty the drop-off box and complete any patron drop-off requests. The LSA is paid for an additional hour every week to complete this task, at an hourly rate of \$30.52/hour (\$1,587.04 yearly).
10. Should the Board choose to close the Dalkeith Express Depot, there will be a savings of approximately \$794 for the remainder of the 2024 fiscal year.

**ALIGNMENT WITH STRATEGIC PLAN:**

N/A

**RECOMMENDATION(S):**

That the Stormont, Dundas, and Glengarry County Library Board close the Dalkeith Express Depot.

# REPORT TO THE SDG LIBRARY BOARD

## Ontario Library Service (OLS) Spring 2024 Board Assembly Meeting (Population 40,000-74,999)

### Introduction

The Ontario Library Service (OLS) held its Spring 2024 Board Assembly Meeting virtually on May 7, 2024, with 13 libraries participating in the meeting. Board Assemblies provide library board members with opportunities to share information and hear how other boards deal with issues in governing a public library. They offer suggestions and support for board training and serve as a communication link between the Ontario Library Service and local boards. OLS staff members are in attendance to provide updates from the Ontario Library Service and share relevant Public Library Board resources.

### Updates from the Ontario Library Service

New recorded webinar

- [Good Governance Through the Lens of the Public Libraries Act](#)

Upcoming Training and Education

- OLS Virtual Conference – Public Library Boards Program
  - Save the date: Thursday, October 24, 2024 (evening)

### Updates from Ontario Library Service Partners

#### Accreditation

- Get your Library Accredited through the [Ontario Public Library Guidelines Monitoring and Accreditation Council](#)
  - 175 Guidelines that represent current best practices for public libraries
- Benefits
  - Evaluation of local library service and directions for development
  - Improved accountability
  - Assistance in the planning process
  - Consistency of service across Ontario
  - Enhancement of the library's position in the community and with funders

#### Upcoming Education Learning Opportunities

- #ONLibChat – “How Can We Support Your Community-Led Work?” – May 28, 2024
- Adapting to Change in the Workplace with Better Stress Management Workshop – June 10, 2024

- Digital Odyssey – “Tackling Misinformation & Disinformation: Innovations & Challenges” – June 10, 2024
- Annual Institute on the Library as a Place – “Tools of Engagement” – June 17 & 18, 2024 @ Mississauga Library
- Visit [Accessola.com](https://accessola.com) to register and for details

### **Election to the Ontario Library Service Board**

Christina da Rocha-Feeley from Halton Hills Public Library was elected to the OLS board for the upcoming 2024-2028 term.

### **Roundtable Discussion**

The roundtable discussion at the end of the meeting is always broad-reaching and dynamic, and included the following topics of group interest:

- Fundraising
  - <https://resources.olservice.ca/funding-developmentBoard>
  - <https://www.innisfilidealab.ca/spark/>
- New library building projects
  - <https://www.georginalibrary.ca/en/about-us/Discovery-Branch.aspx>
- Bookmobiles
  - <https://library.brucecounty.on.ca/bookmobile/>
- Valuing Ontario Libraries Toolkit (VOLT)
  - <https://resources.olservice.ca/volt>
- Board Training
  - 2023 OLS [Virtual conference](#) recording with keynote Dr. Kate Graham

### **Fall Board Assembly Meetings**

Fall Board Assembly meetings will take place during the first three weeks of November 2024

- Weeks of November 4, 11, and 18
- Exact dates to be announced

**STAFF REPORT**

**S.R. No. 10-2024**

**PREPARED BY:** Rebecca Luck – Director of Library Services

**PREPARED FOR:** SDG Library Board

**LIBRARY BOARD DATE:** May 23, 2024

**SUBJECT:** Service Delivery Review

**BACKGROUND:**

1. The Service Delivery Review for the Stormont, Dundas and Glengarry County Library was prepared by TCI Management Consultants (in collaboration with Beth Ross and Associates and Bibliotechs), dated December 2022.
2. The Service Delivery Review was presented to the Library Board for review at the February 16, 2023 Library Board meeting.

**ANALYSIS:**

3. The Service Delivery Review made twenty (20) recommendations in the following seven areas:
  - a. Organization, Staffing and Succession
  - b. Public Programs and Services
  - c. Policies and Procedures
  - d. Networking and Communications
  - e. Branches and Facilities
  - f. Technology
  - g. Governance
4. The twenty (20) recommendations were as follows:

<b>RECOMMENDATION</b>	<b>PROGRESS</b>
<b>Organization, Staffing and Succession</b>	
Recommendation 1: Streamline the current organizational structure	Did not proceed with recommendation.
Recommendation 2: Revise the Systems Librarian into an Information Services Librarian position. Reinstatement the Systems Support Coordinator	The Systems Librarian has been renamed as the 'Information Services Coordinator', with responsibilities for emerging technologies, electronic resources, technical services, and the overall Library technology portfolio. Did not proceed with recommendation regarding the Systems Support Coordinator.
Recommendation 3: Reinstatement the Communications and Marketing Coordinator position	The position of Communications and Marketing Coordinator has been reinstated.

Recommendation 4: Develop a specific succession plan	The former Director of Library Services retired in June 2023. As such, a review of the job description was completed, remuneration and related benefits were determined, the opportunity was announced with an established timeframe, and this was communicated to staff and the public.
<b>Public Programs and Services</b>	
Recommendation 5: Continually develop new programs and services	SDG Library staff continue to be innovative and provide programs and services that respond to community need.
Recommendation 6: Review hours of operation at all branches	A neighbourhood profile will be completed in 2024. Following the neighbourhood profiling, the hours of operation will be reviewed.
Recommendation 7: Develop more active but targeted marketing program	With the reinstatement of the Communications and Marketing Coordinator, a Marketing Plan has been developed, recommending selective use of marketing resources where they are most likely to be the greatest benefit.
<b>Policies and Procedures</b>	
Recommendation 8: Review all policies through a customer-focused lens	Ongoing.
Recommendation 9: Conduct an audit comparing the SDG Library policies with the ones included in the Ontario Public Libraries guidelines	Ongoing.
Recommendation 10: Prepare an online policy and procedure manual for all staff access	Ongoing.
Recommendation 11: Review the overdue fines policy with a goal of reducing barriers to Library use	Seeking the Board's feedback.
<b>Networking and Communications</b>	
Recommendation 12: Increase the frequency of staff communications and networking events	In 2024, we will have two (2) District Meetings (Winter and Summer), two (2) General Staff meetings (Spring and Fall), MakerLab training, and a variety of social events in order to create more opportunities for staff interactions.
<b>Branches and Facilities</b>	
Recommendation 13: Review highest relative cost branches to determine ways to reduce costs	Ongoing.
Recommendation 14: Review lowest relative cost branches to determine ways to increase utilization	Ongoing.
Recommendation 15: Conduct facility review process	Ongoing.



Recommendation 16: Consider County acquisition of Library facilities	Did not proceed with recommendation.
Recommendation 17: Consider alternative services in remote and rural locations	Implemented the Morewood Express Depot in Fall 2023.
Recommendation 18: Consider central or main branch	Did not proceed with recommendation.
<b>Technology</b>	
Recommendation 19: Develop a multi-year technology plan	A technology plan is currently being created that will include an inventory of existing technology assets, an annual plan and budget to add technologies to meet service goals, and a life cycle plan for disposal of dated or broken technologies, and their replacement.
<b>Governance</b>	
Recommendation 20: Encourage Board diversity	Considered in Board recruitment.

- Staff is seeking feedback from the Board as to which recommendations they would like to pursue over the course of this Library Board's term.

**IMPACT ON 2024 BUDGET:**

- N/A

**ALIGNMENT WITH STRATEGIC PLAN:**

Goal 1: Growing our Physical and Digital Infrastructure

Goal 2: Conduct Community Outreach

Goal 3: Strengthen our Organization

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# Service Delivery Review for the Stormont, Dundas and Glengarry County Library

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*December 2022*



in association with

**Beth Ross & Associates  
Bibliotechs Inc.**



## TCI Management Consultants

12 Lawton Blvd., Toronto, Canada, M4V 1Z4 • Fax: (416) 515-1255 • web: <http://consulttci.com>

December 8, 2022

Karen Franklin, MLIS, APLL  
Director of Library Services  
SDG Library  
26 Pitt Street, Suite 106  
Cornwall, ON K6J 3P2

Dear Karen:

**Re: SDG Public Library – Service Delivery Review**

We are pleased to submit our Service Delivery Review Report. It is evident that the SDG Library is much appreciated by the residents of the United Counties and that staff and the Board are committed to the Library's success. The Library's mission is to connect communities through innovative services, literacy resources, independent learning, creative expression, leisure, and civic engagement.

We are confident the recommendations contained herein will allow the Board and staff of SDG Library to achieve its mission in a more efficient and effective manner.

We appreciate the considerable help you have given us on this project and look forward to its successful implementation.

Yours truly,

A handwritten signature in black ink, appearing to read 'Greg Young'.

Greg Young  
Director: Tel: 416-515-2705  
c.c. J. Linton, B. Ross, K. Slimman

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## **Executive Summary**

### **Purpose of the Service Review**

Earlier this year (2022) the Stormont, Dundas and Glengarry County Library (SDG Library) undertook the development of a Strategic Plan to guide its activities over the next five years (2023 – 2027). Several of the key strategic actions identified pointed to the need to undertake a subsequent Service Review study to examine: the organization of the Library, succession planning, the delivery of programs and services, the adequacy and utilization of facilities, and other key aspects of the operation that affect the services delivered to users.

The specific purpose of the work was articulated in the Request for Proposal to be:

*“This request for proposal (RFP) is an invitation by the Stormont, Dundas and Glengarry County Library – doing business as the SDG Library – to prospective firms to submit proposals for the provision of consulting services for a service review – with an emphasis on the organizational structure – which is to include an evaluation of the current service delivery model. Recommendations of this review are expected to identify opportunities to enhance and improve overall effectiveness and efficiency within the Library, and to suggest improvements to the Library’s staffing requirements.”*

In September 2022, TCI Management Consultants, in collaboration with Beth Ross and Associates and Bibliotechs was retained to undertake the work.

### **Activities Undertaken**

As an extensive stakeholder review had just been undertaken in support of the recently completed Strategic Plan, there was no need to undertake a community survey for this project. This work provided excellent background material showing community support for the Library as well as areas for improvements. With this as context, several other data collection activities were undertaken: a site visit tour of all branches; review of background documents, policies and procedures; a staff survey; consultations with key stakeholders; and a benchmarking assessment of comparable Library systems. Several meetings with the consulting team and the Director of Library Services took place.

### **Recommendations**

Twenty recommendations in seven areas were developed. These were: A) Organization, Staffing and Succession; B) Public Programs and Services; C) Policies and Procedures; D) Networking and Communications; E) Branches and Facilities; F) Technology; and G) Governance. These recommendations were as follows (in some cases additional supporting text is provided as further rationale for the recommendation; full details are presented in the Report itself).

#### **A) Organization, Staffing and Succession**

**Recommendation 1: Streamline the current organizational structure.**

**Recommendation 2: Revise the Systems Librarian into an Information Services Librarian position. Reinstate the Systems Support Coordinator.**

**Recommendation 3: Reinstate the Communications & Marketing Coordinator position.**

**Recommendation 4: Develop a specific Succession Plan:** Certain senior staff may be retiring in the foreseeable future (probably within the timeframe of the current Strategic Plan). Accordingly, a specific succession plan needs to be put in place as an immediate priority. The specific details of such a succession plan are not within the remit of this Service Review, but the components contained within it would be: **a)** review of the job description of senior positions, with a view to making any changes deemed necessary by this Service Review and the recent Strategic Plan; **b)** determination of remuneration and related benefits in light of any change in scope or responsibilities; **c)** articulation of the process to be followed in terms of announcing the opportunity, decisions as to whether internal and external candidates will be entertained, whether a search firm will be employed, etc.; **d)** determination of the likely or ideal timeframe for decision-making; and **e)** communications to staff and public around the replacement process. This is a major responsibility of the Board and should be a top priority.

## **B) Public Programs and Services**

**Recommendation 5: Continually develop new programs and services.**

**Recommendation 6: Review hours of operation at all branches.**

**Recommendation 7: Develop more active but targeted marketing program.**

## **C) Policies and Procedures**

**Recommendation 8: Review all policies through a customer-focused lens:** As part of the 'Community Outreach' component of the new Strategic Plan, all policies should be reviewed from the perspective of the customer. This would entail a review of all policies from five perspectives: 1) How is the experience of the Library user affected, positively or negatively, by this policy? 2) Is the Library user aware of the policy and how it affects them? 3) What changes need to be considered (or just made) to the policy to improve the user experience? 4) Should any changes made be communicated to Library users, and if so, how? and 5) How will we measure any positive change (or is it even important to do so)?

**Recommendation 9: Conduct an audit comparing the SDG Library policies with the ones included in the Ontario Public Libraries Guidelines.**

**Recommendation 10: Prepare an online policy and procedure manual for all staff access:** This should include an alert/sign off mechanism to ensure that all staff are up to date with policies and procedures.

**Recommendation 11: Review the overdue fines policy with a goal of reducing barriers to Library use.**

## **D) Networking and Communications**

**Recommendation 12: Increase the frequency of staff communications and networking events.**

## **E) Branches and Facilities**

**Recommendation 13: Review highest relative cost branches to determine ways to reduce costs.**

**Recommendation 14: Review lowest relative cost branches to determine ways to increase utilization.**

**Recommendation 15: Conduct facility review process:** At the end of the 'trial period' referenced above, and in reviewing the results of the specific plans and targets for the highest and lowest relative costs groups, the SDG Library should consider implementing over time, a facility review process, possibly to reduce the number of branches or increase the size of particularly well-used branches. It is suggested that this be phased in over a three-year period after the four-year period of the current Strategic Plan.

Municipality	Current Branches in Municipality	Possible Longer-Term Solution
North Dundas	<ul style="list-style-type: none"> <li>Winchester</li> <li>Chesterville</li> <li>South Mountain</li> </ul>	<ul style="list-style-type: none"> <li>retain South Mountain branch</li> <li>retain Chesterville branch</li> <li>consider closing Winchester branch</li> </ul>
South Dundas	<ul style="list-style-type: none"> <li>Iroquois</li> <li>Morrisburg</li> <li>Williamsburg</li> </ul>	<ul style="list-style-type: none"> <li>retain Iroquois branch</li> <li>consider closing either Williamsburg or Morrisburg</li> </ul>
North Stormont	<ul style="list-style-type: none"> <li>Crysler</li> <li>Avonmore</li> <li>Finch/MakerLab</li> </ul>	<ul style="list-style-type: none"> <li>retain Avonmore branch</li> <li>consider closing either Chrysler or Finch MakerLab</li> </ul>
South Stormont	<ul style="list-style-type: none"> <li>Ingleside</li> <li>Long Sault</li> <li>St. Andrews West Express Depot</li> </ul>	<ul style="list-style-type: none"> <li>retain Long Sault branch</li> <li>consider closing Ingleside or St. Andrews West Express West</li> </ul>
North Glengarry	<ul style="list-style-type: none"> <li>Maxville</li> <li>Alexandria</li> <li>Dalkeith Express Depot</li> </ul>	<ul style="list-style-type: none"> <li>retain Alexandria and Dalkeith branches</li> <li>consider closing Maxville branch</li> </ul>
South Glengarry	<ul style="list-style-type: none"> <li>Williamstown</li> <li>Lancaster</li> <li>Glen Water Express Depot</li> </ul>	<ul style="list-style-type: none"> <li>(likely) expand Lancaster and close Williamstown</li> </ul>

**Recommendation 16: Consider County acquisition of Library facilities:** After any rationalization of the system as a result of the previous recommendations, the SDG Library should encourage the County to acquire the properties that constitute the system at that point (where this is possible and makes sense, recognizing that several are in facilities that are shared with other uses). This will ensure a level of consistency with respect to the ongoing maintenance and care of the facilities.

**Recommendation 17: Consider alternative services in remote and rural locations.**

**Recommendation 18: Consider central or main branch.**

## F) Technology

**Recommendation 19: Develop a Multi-Year Technology Plan:** This plan should incorporate both the ‘internal’ and ‘external’ aspect of technology as previously discussed and incorporate the following components:

- Provide adequate staffing levels for administration, support, and backup of Library technology services.
- Provide additional training resources for staff and patrons.
- Investigate functional and financial benefits of moving the ILS from a locally hosted system to a cloud service.
- Include capital and operating costs of planned implementation in the Technology Plan.
- Investigate and implement resources for self-service and after-hours options.
- Review and install remote support tools for Library systems staff.
- Investigate Polaris ILS modules for operational efficiencies.
- Continue work with the County on access to a broadband solution.

## G) Governance

**Recommendation 20: Encourage Board Diversity.**



### ***Implementation***

A detailed Implementation Plan was developed that contained for each recommendation: timing and critical path considerations; resource requirements (human and financial); and suggested targets and outcomes.

### ***Conclusion***

The SDG Library system is clearly a strong and well-loved institution throughout the United Counties. Its central position as a community resource and activity hub has been validated and reinforced through its recent Strategic Planning process. It is, however, weak on some key service indicators when compared to similar-sized Library systems (e.g., visits per capita, program attendance, circulation). In large part this is caused by the fact that the system is characterized by many small branches in rural locations and exacerbated by lower resourcing (funding and staff) than seen in other comparable Library operations.

Moreover, the SDG Library system is on the cusp of change. Staff turnover at the senior levels within the next few years is a virtual certainty. Key functional positions remain unfilled.

This Service Review and its recommendations are designed to address this situation. A tightening of the organizational structure; the development of a succession plan; filling key positions; a hard look at the efficiency of the branches and development of plans to improve this; and an eventual decision to close some branches and possibly expand others (with possibly the development of a central administrative branch) are key elements of a plan to ensure that the system continues to be a relevant and meaningful resource to the community, and can achieve even greater success in the future.

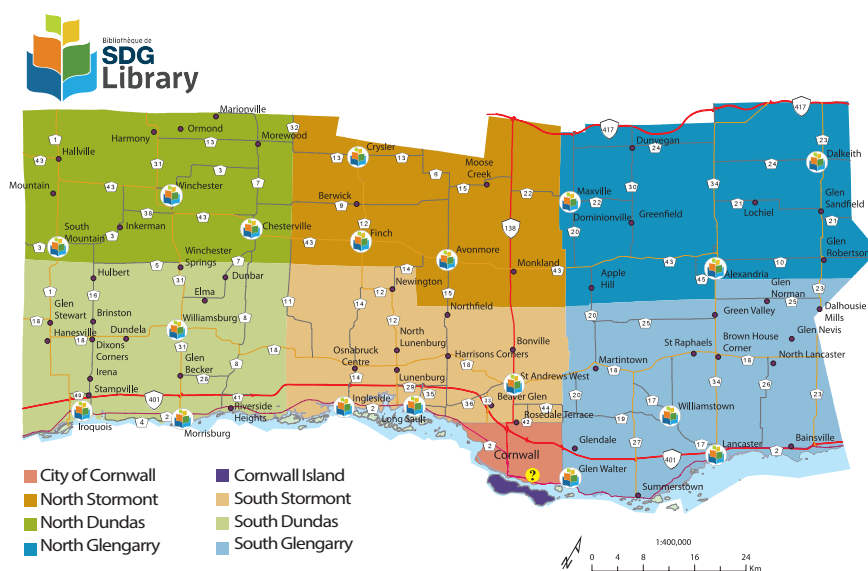
# 1. Introduction and Background to the Project

In this **Introduction and Context** section of the Report, we first provide a high-level overview of the **current operations** of the SDG Library, followed by a summary of the **background and context** to this service review and the **specific objectives** of the work. This is in turn followed by an explanation of the **format and structure** of the review. The **activities undertaken** over the course of this review are next described and finally, some **cautions and caveats** that should be borne in mind when interpreting this review.

## 1.1. Overview of the Current SDG Library System

The regional municipality of the United Counties of Stormont, Dundas and Glengarry (SDG) is located along the St. Lawrence River at Ontario's south-eastern border. The community has 65,000 residents serving a large, primarily rural geographic area of 3,300 square kilometres. The community has a rich cultural heritage and quality of life, is extremely scenic and proudly describes itself as "Where Ontario Began".

The Stormont, Dundas and Glengarry Library County (SDG Library) provides Library services throughout the region (United Counties). Its administrative offices are in the County Administration building. Library services are provided from its 15 branches and 3 express depot locations in partnership with local municipalities and businesses. It also supports 3 "little free Library" stands and provides outreach services to underserved areas. These branches include 5 resource branches and 10 neighbourhood branches spread throughout the six local municipalities that make up the SDG United Counties. The Library leases its branches from the local municipalities. A map of the branch locations is shown below.



SDG Library has a 2022 budget of \$2,822,000 of which 91% is funded by the regional municipality. The Library has 42 non-union staff including 11 FTEs and 31 part-time staff. The SDG Library Board is made up of 3 citizens and 4 County Councillors.

## **1.2. General Background Context to this Service Review**

At the commencement of the assignment, the CEO provided additional background and context to the Service Review. The following summarizes some key issues:

- Because of its geography and history, SDG Library contains a large number of relatively small branches, many of which were originally established to serve rural communities and hamlets with small populations. In 2016, to achieve efficiencies, SDG Library closed three branches which naturally encountered some resistance and protests in the affected communities.
- Fourteen of the fifteen branches are owned by the local municipalities and are leased to the Library. In 2022, the Library's budgeted expenses for building rent and utilities are \$191,000 and facilities costs are an additional \$137,000. With six local municipalities, the level of support provided and the size and quality of each facility are quite variable. Many branches are very small. The County has little incentive to expand facilities when the need arises or to meet Library facility space standards.
- SDG Library has had difficulty filling some of its staff positions. The Community Librarian and Systems Librarian positions are currently vacant.
- The arrival of the pandemic which affected operations at the beginning of 2020 has made it more difficult to recruit these positions. The difficulties in recruiting positions have added to the responsibilities and workload of the CEO who has taken over responsibility for collections development and other duties that were intended to be carried out by other staff.
- With its relatively large number of branches, staff are usually alone in the branches and it is difficult for staff to have many opportunities to communicate with each other and to build a team environment except through video communications.

### 1.3. Specific Purpose and Objectives of this Service Review

The broad and general purpose of this project was stated in the Terms of Reference to be as follows:

*“This request for proposal (RFP) is an invitation by the Stormont, Dundas and Glengarry County Library – doing business as the SDG Library – to prospective firms to submit proposals for the provision of consulting services for a service review – with an emphasis on the organizational structure – which is to include an evaluation of the current service delivery model. Recommendations of this review are expected to identify opportunities to enhance and improve overall effectiveness and efficiency within the Library, and to suggest improvements to the Library’s staffing requirements.”*

Within this overall framework, specific goals of the Service Review were stated to be:

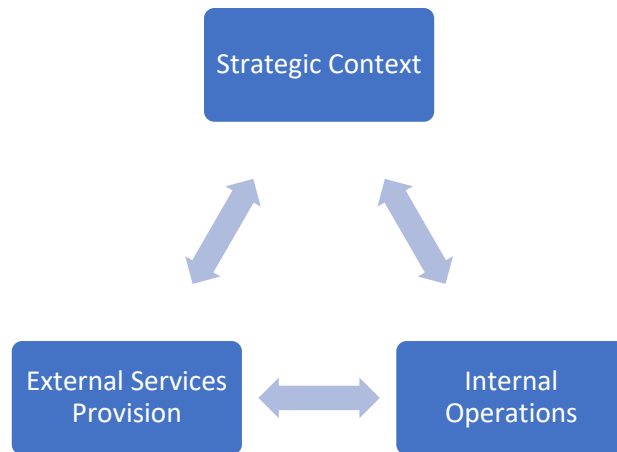
1. To recommend an appropriate organizational structure to meet future needs and expectations;
2. To identify public Library best practices and make recommendations for their possible application;
3. To identify areas for development of human resources, and to help with succession planning;
4. To consult with the following resources as part of the process, which includes, but is not limited to:
  - *ARUPLO Guidelines for Rural/Urban Public Library Systems, 3rd edition, 2017* (<http://aruplo.weebly.com/guidelines.html>)
  - *Ontario Public Library Guidelines (latest version)*
  - *SDG Library. Moving Forward: Strategic Plan, 2018-2022* (<https://www.sdglibrary.ca/about-us/Library-board/Library-mission-statement>)
  - *Stakeholder Engagement Report, 2022 (Laridae Communications) – part of current Strategic Planning work (available by request to the Director of Library Services)*

It was also noted that a new Strategic Plan had recently been approved and that this document should inform the current study (to the extent possible) over the course of the work.

This mandate gave rise to the specific work plan developed (and which is further described in Section 1.5 of this Report). Appendix B of this Report contains a high-level summary of this Strategic Plan.

## 1.4. Structure of this Service Review

Our approach to undertaking a Service Review recognizes that there are **external** programs and services provided to the public which need to be examined, as well as **internal** policies, processes and practices, not seen by the public, that also need to be assessed. And all of this should take place within a **strategic context** of servicing the community and responding to its needs, most often expressed in the form of the Strategic Plan of the Library operation. This is 'form follows function': the 'form' of the Library organization and the services it provides, should follow the function (i.e., the strategic purpose) of the Library.



The logic of this approach is as follows:

- **Strategic Context:** This provides the overall grounding for the service review in terms of articulating the purpose and function of the Library system, its overall operations in the community, etc. The strategic context sets out the fundamental basis for the Library system operating in the community. In the case of the SDG Library, the new Strategic Plan was completed in 2022; this service review is thus very opportune.
- **External Services Provision:** In many respects, the most important aspect of a service review lies in the review of services provided to the public which is, after all, the fundamental purpose of the Library. This aspect of the review examines the operation of the Library as it provides services to the public, and thus considers not only programs and services intentionally offered to the community, but also other aspects of how users interact with the Library including matters such as visitor flow through the building, interaction with staff, etc.
- **Internal Service Operations:** This aspect of the service review considers the 'behind the scenes' aspects of Library operations. This relates to internal operations that are not directly seen by the public, but that may critically affect the efficiency and effectiveness with which services are able to be offered. Matters such as workflow, internal

communications, job responsibilities, policies, the organizational efficiency, etc. are all considered under this aspect of the service delivery review.

This tripartite framework thus covers all aspects of operations that should be included in an integrated service review. This framework was used as an overall guide in the research and analysis activities of our proposed workplan. In accordance with the Terms of Reference, specific focus was given to matters related to the organization structure and related human resource policies and procedures, as well as best practices

## 1.5. Activities Undertaken

A number of activities were undertaken in the course of this service review. These were:

- initial start-up meeting with Library CEO
- on-site visits to each of the 15 Library branches in the community
- review of all relevant background materials, including performance and related data for each of the 15 branches
- review of community Library trends and issues
- review of the previous (Spring, 2022) community consultation, undertaken as part of the background preparation for the new Strategic Plan
- staff survey (to which all staff responded)
- consultations with key stakeholders in the community
- consultations with key municipal officials
- preparation of this report in draft and final forms
- presentation to Library Board.

The project began in September of 2022 and concluded in December of that year.

## 1.6. Assumptions and Caveats

There are some considerations that need to be kept in mind when reviewing this report:

- **This is a high-level Strategic Service Delivery Review:** A Service Review is by definition a high-level document, describing broad intentions and areas of action, rather than a specific program of activity at a granular level of detail. This plan thus sets the stage for a number of subsequent initiatives and does not (and cannot) by itself answer all questions and address all issues that may be raised. In addition, as is the case with any Service Review there will be unforeseen challenges and new opportunities that arise over its implementation, and that must be dealt with. While a Service Review plan cannot anticipate all of these, it should set the overall context within which the Board and senior Library management team can make decisions on these new challenges and opportunities.

- **Review covers a five year+ timeframe:** This review is intended to cover a five-year time horizon, after which point it should be refreshed and updated. The implementation plan (contained in Section 5 of this Report) accordingly looks to the five-year period from 2023 to 2027. However, despite being time-limited in this manner, the Strategic Service Delivery Review should set an overall tone and direction that will carry the institution forward beyond the period of the plan itself.
- **Project entirely undertaken during the pandemic:** This project was undertaken largely during final quarter of 2022, when the pandemic was subsiding but still deeply influencing meeting behaviour. Aside from the site visit to all branches (undertaken according to proper distancing protocols), all meetings were held via video conference or telephone. In the opinion of the consultants, while not ideal, this in no way compromised the integrity of the findings or conclusions of the work.

## 2. Data Collection and Situation Analysis

This **Data Collection and Analysis** section of the report describes all the data gathering activities undertaken. First a review of **relevant policies and background reports** is presented. Next, we review the **relevant findings and conclusions of a community stakeholder consultation process** that was undertaken earlier this year as input to the development of the new Strategic Plan. Then, specific data collection activities undertaken in support of this service review are discussed: a **staff survey** (to which most staff responded); and a **benchmarking assessment** of other comparable Library systems. Finally, all of these various lines of evidence are combined into a **Strengths, Weaknesses, Opportunities and Threats (SWOT) synthesis**, that then forms the basis for the recommendations subsequently developed.

### 2.1. Review of Relevant Policies and Reports

Key documents relevant to this study included:

- Stakeholder Engagement Report by Laridae Consulting (2022), based on surveys and interviews with over 270 community members;
- SDG Library 2022-2026 Strategic Plan (see Appendix B);
- Stormont, Dundas & Glengarry County Library Facility Model Report (2012);
- Lease agreement template for branch leases;
- Operational and Board policies retrieved from the Library's website;
- Job descriptions, organizational chart;
- Various reports and files provided by the Director of Library Services;
- Statistics retrieved from the Province of Ontario's open data website.

The new Strategic Plan includes three strategic directions:

1. Physical and digital infrastructure;
2. Community outreach;
3. Organizational strength.

This review is primarily a result of the third strategic direction, Organizational Strength, "with the goals of clarifying roles and expectations, balancing responsibilities and capacities, and potentially creating efficiencies through centralization and/or partnerships."

The Library's Facility Model Report from 2012 identified a significant deficit in Library space and recommended a facility model with six expanded resource branches in the six local municipalities, Winchester (North Dundas), Morrisburg (South Dundas), Avonmore (North Stormont), Ingleside (South Stormont), Alexandria (North Glengarry), and Lancaster (South Glengarry), as well as neighbourhood branches. Currently, Alexandria, Ingleside, Lancaster,



Morrisburg, and Winchester function as resource branches but the recommended expansions have not taken place. The space deficit has increased significantly. The SDG Library leases the Library branches from the local municipalities on a square foot basis with the amount adjusted for inflation. The SDG Library has been able to expand hours of operation at most branches, also a recommendation of the Facility Model Report. While this is not a facility study, the number, quality, and size of branch facilities has a significant impact on Library services.

While following the Public Libraries Act, the SDG Library functions as a department of the County, and Board policies have directed responsibility for areas such as human resources, payroll, financial services, and information technology to the County. The Library pays a service charge for these support services. Many other county libraries function this way.

## 2.2. Review of Previous Stakeholder Engagement Report (April 2022) Results

In February to March of 2022 a community survey was undertaken by Laridae Communications Inc. to obtain thoughts from the general public regarding the Strategic Plan. Several of the findings from that exercise are relevant to this service review. The main findings were:

- 250 responses were obtained
- of these, the majority of respondents described themselves as ‘member patrons’ (70%); ‘visitors’ were the next most frequent response category (15%) followed by ‘staff’ (8%)
- Respondents indicated that Ingleside was the most commonly-used branch – while no respondents indicated usage of Glen Walter Express or Dalkeith Express; the specific utilization of each branch by respondents was:

Branch	% of Respondents Indicating Use
Ingleside	24%
Long Sault	18%
Winchester	14%
Morrisburg	13%
Alexandria / Succursale Alexandria	13%
Chesterville	9%
South Mountain	9%
Williamsburg	8%
Iroquois	8%
Lancaster / Succursale Lancaster	7%
None – do not use any branches	6%
Crysler Branch / Succursale Chrysler	5%
Williamstown	5%
Finch Branch / Makerlab	4%
Avonmore	4%

Maxville	3%
St. Andrews Express Depot	1%
Glen Walter Express Depot	0%
Dalkeith Express Depot	0%

- of member patrons, 29% had visited a Library branch or accessed online services more than once a week, with a further 28% indicating ‘about once a week’ (so nearly 60% in the two categories); about 14% had not visited a Library branch or accessed online services at all in the previous year
- most (about 75%) member patrons indicate that they have a good understanding of what the SDG Library does; only 1 respondent (of 174) indicated that they ‘do not understand what SDG Library does’
- the major sources of information about the Library (from all users, not just member patrons) were:
  - *from staff or volunteers: 57%*
  - *from social media: 36%*
  - *from the website: 30%*
  - *from email: 17%*
  - *from newsletters: 11%*
  - *by word of mouth: 10%*
- services and programs that all respondents were most aware of were:
  - digital eBooks and Audiobooks: 86%
  - print collection: 77%
  - printing and copying services: 73%
  - emagazines, digital newspapers and research database: 72%
  - free museum passes: 67%
  - author visits: 65%
  - 3-D printing 55%
  - Book club meeting nights: 52%
  - Library of Things: 49%

*All other programs and services scored less than 50%. Also bear in mind that these responses were for all respondents including staff and Board members (10% of the total sample) who presumably would have greater knowledge of programs and services than the general users, so these percentages may not be fully representative.*

- respondents were asked to select which word was most descriptive of the positive aspects of the SDG Library; responses were:

- *helpful: 58%*
- *community focussed: 38%*
- *respectful: 31%*
- *resourceful: 29%*
- *responsive: 20%*
- *inclusive: 15%*
- *understanding: 12%*
- *adaptive: 10%*
- *relevant: 9%*
  
- *all other responses scored less than 10%*

- next, respondents were classified as either ‘promoters’ or ‘detractors’ of the Library, based on their response to a question of how likely they would be to recommend the Library to a friend or colleague. The responses, by category of respondent, were:

<b>Respondent Category</b>	<b>% of Respondents ‘Promoters’</b>	<b>% of Respondents ‘Passive’</b>	<b>% of Respondents ‘Detractors’</b>
Staff Members	100%	0%	0%
Volunteers	100%	0%	0%
Partner Organizations	75%	25%	0%
Board Members	60%	40%	0%
Member Patrons	75%	17%	8%
Visitors	55%	22%	23%
Municipal Stakeholders	38%	24%	38%

- Satisfaction with Collections

<b>Service</b>	<b>Number of Respondents Rating Satisfaction</b>	<b>% of Total Respondents (250)</b>	<b>Number of Respondents Indicating ‘Very Satisfied’</b>	<b>% of Total of All Respondents Rating Services Who Are ‘Very Satisfied’</b>
Physical book collections	190	70%	95	50%
InterLibrary Loans	160	64%	80	50%
DVDs	130	52%	55	42%
eBooks	120	48%	50	42%
Other digital content	80	32%	40	50%
eAudiobooks	75	30%	30	40%
Library Depots	65	26%	35	54%
Books on CD	60	24%	20	33%
Library of Things	35	14%	15	43%

- Satisfaction with Children’s Programming

Service	Number of Respondents Rating Satisfaction	% of Total Respondents (250)	Number of Respondents Indicating ‘Very Satisfied’	% of Total of All Respondents Rating Services Who Are ‘Very Satisfied’
Children’s Story Time	52	21%	28	54%
Summer Reading Club	42	17%	23	55%
March Break Programming	20	8%	10	50%
STEM Programming	17	7%	8	47%
Lego Clubs	14	6%	9	64%

- Satisfaction with Youth and Adult Programming

Service	Number of Respondents Rating Satisfaction	% of Total Respondents (250)	Number of Respondents Indicating ‘Very Satisfied’	% of Total of All Respondents Rating Services Who Are ‘Very Satisfied’
Author visits	50	20%	37	74%
Book Club Meetings	32	13%	26	81%
Read for 15 SDG Challenge	27	11%	19	70%
Book Club Kits	25	10%	17	68%
Annual Summer Reading Club	19	8%	16	84%
Craft club meet-ups	18	7%	15	83%
Knitting club meet-ups	13	5%	10	77%
Ancestry club meet-ups	9	4%	8	89%
Game nights	7	3%	2	29%

- Overall Satisfaction with SDG Library Services

Service	Number of Respondents Rating Satisfaction	% of Total Respondents (250)	Number of Respondents Indicating 'Very Satisfied'	% of Total of All Respondents Rating Services Who Are 'Very Satisfied'
Printing & Copying Services	76	30%	64	85%
Computers & Internet	72	29%	53	74%
Museum passes	61	24%	40	66%
Meeting rooms and reservations	39	16%	30	77%
3-D Printing	29	12%	14	48%
Visiting Services	12	5%	9	75%
Commissioner of Oaths	7	3%	6	86%
CEL Collections	4	2%	3	75%
Exam Invigilation	3	1%	2	67%
Homework Helpers	2	1%	2	100%

**Reaction to Mission and Vision:** Specific comments on the Vision and Mission statements are not recapped here as they resulted in changes that have already been implemented to the plan. However, several open-ended comments were made that are directly relevant to this service review. These are:

- continue if not expand programs in French
- every branch should be a functional, useable Internet hub
- better technology should be available in each branch (e.g. colour printers)
- consider more resources available for small local business
- bricks and mortar presence in local communities is vital
- Morewood needs a branch or equivalent service
- more local history
- greater awareness of what is available is needed – particularly interLibrary activities
- more connection with local schools desirable
- longer hours at the smaller branches to make them more accessible
- greater connections with non-users needed

**Highest-Priority Recommendations (all respondents):**

- broader range of Library collections (53%)
- improved hours of operation (52%)
- longer loan periods (23%)
- more virtual programming and events (16%)

- Library programming that better suits my needs (?) (12%)
- shorter loan period for popular items (10%)
- improved facilities, amenities and layout (5%)

### 2.3. Key Stakeholder Consultations

A few key stakeholders were invited to complete a stakeholder survey. Responses were received from the Chief Administrative Officer of the United Counties of SDG, a Consultant with the Ontario Library Service, the Chair of the Library Board and the Director of Library Services. Most respondents were very familiar with the SDG Library system. Following are some perspectives shared by the stakeholders.

- **Most programs are working well** – There are good public hours at the branches; there is a good array of online subscriptions and services; staff are helpful and pivoted well during the pandemic; outreach has worked well; growth of both digital and hard copy collections has proceeded well; the Director of Library Services has a good working relationship with the Board.
- **A few programs are not working as well** – Issues identified included that the Library is short staffed; the website requires an overhaul; WiFi at the branches requires a password; some branches are small and in poor condition; the Library is at the mercy of landlords and there is a need to increase the number of people using the branches.
- **Strengths of the Library** – good coverage across the County for in-person and digital; staff provide good customer service; the Library is fiscally responsible and is a good community partner.
- **Weaknesses of the Library** – a large geographic area makes it hard to get the message out about Library services; facilities are too small and there are lots of branches; staff turnover and burnout, website is dated and needs to be fully accessible; internet speed at branches; several branches are inadequate; system needs to be rationalized.
- **Comments on the branches** – Chesterville is small and dated, has accessibility issues; Finch is small and has no storage space; Iroquois is a dated location and more space for programming would be desirable; Lancaster is a dated building with not enough space for programming or a resource branch and is also underutilized; Maxville is too small, underutilized and dated; Williamsburg is set far back from the road with no signage currently and is likely underused; Williamstown is privately owned and has air quality issues.
- **Barriers to Use** – Stakeholders believe the branches are welcoming for diverse groups based on culture, ethnicity, income, sexual orientation etc. Other barriers identified

included time limits on use of computers; password on wifi; not all branches are fully accessible; website not fully accessible; hours of operation, and unappealing spaces.

- **Groups well served** – groups identified as being well served included children 12 or younger; middle adults, seniors and families with young children. Groups identified as somewhat well served included teens, young adults, newcomers, New Canadians, LGBTQ2+ and BIPOC individuals.
- **Comments on marketing and communications** outreach is frustrating especially with vacant positions; consider public champions where each person tells someone about the Library, website needs updating; social media being done by different individuals; Library lacks ability to make its own videos; many do not know about or use the Library.
- **Keep Library as is or change it** views of stakeholders were mixed – one believed it is fine as it is; another would like an organization structure that makes sense with the right people in the right jobs including an improvement in internal communications; there was a suggestion to get younger people on the board; another stakeholder would prefer to see the branches rationalized down to six with County ownership. There were mixed views on the future of the branches with two believing fewer branches were needed and one comment that better facilities were needed in the areas where they already are.
- **Increasing community engagement** – a suggestion was made to have the SDG Library connect with new community members in new housing developments; also have pop-up Library kiosks at community events throughout the year. Various partnerships were suggested to increase engagement including partnerships with youth groups, and better communication with the various municipalities around events.
- **Relationship with County and municipalities** – Respondents believe the Library has a very good relationship with the County. Relationships with the municipalities are also good – further marketing and partnership opportunities should be explored. There was also a perspective that local municipalities who own the buildings do not value the Library.
- **Alternative service delivery** – The Library has considered mobile services in the past. It would require determining what the mobile service would look like, how it would be staffed and funded. The possibility of self-serve kiosks that would allow open hours outside of staffed hours has also been discussed. If obtained they should be located at the busiest branches, i.e., Alexandria and Long Sault.
- **Other comments** – This is an ideal time for the operational review. Before filling positions, we need to know if the jobs, job descriptions, services provided and reporting structures are aligned. We also need to provide with opportunities to grow and move

within the organization (succession planning). Overall the Library does a great job with the resources provided.

## 2.4. Staff Survey Findings and Implications

The confidential staff survey was completed by all staff. Following are the highlights.

- **About Job conditions, supervision, job descriptions, support, training, communication** – Perspectives raised by staff included the need to have comprehensive job descriptions to cover all tasks; there is lack of support with the job vacancies in administration leading to a heavy workload
- **Enjoy most about the job** – Staff enjoy most the patrons and working with people; the community; promoting books, readers advisory and solving tech problems; the variety of work and working with their colleagues
- **Enjoy least about the job** – Staff enjoy least rude or difficult patrons; inability to help patrons; keeping up to date with technology; lack of communication from outside my branch; working alone; especially at night in remote branches; changes in procedures with no opportunity for input; lack of consequences when staff ignored covid restrictions; short shifts; and need for more training
- **Electronic resources we should make available** – Staff would like to see more resources for children and teens; Consumer Reports; video games; CreativeBug, Active Reading, HOOPLA. Staff also need to ensure they are knowledgeable on how to use these resources.
- **Size of branches** – there were some comments that the branches were too small and there is no room for programming, study rooms or meeting rooms; many say the size of their branches is fine
- **Strength of your local branch** – (branch not identified) location, welcoming quaint, beautiful; friendly, helpful staff; diverse collection
- **Weaknesses of your local branch** – (branch not identified) worn, needs updating; little programming for teens; difficult to connect with other organizations; lack of space for programming; too small, no meeting rooms or study spaces
- **Accessibility issues In your branch** – (branch not identified) branch is accessible but washrooms are not; exterior doors; need larger, accessible parking spots; automated door opener for interior doors; parking lot and snow removal; size of elevator.



- **Welcoming spaces for diverse groups/individuals** – Staff believe their spaces are welcoming but one staff mentioned there is no space for them to meet
- **Barriers to use** – barriers to usage mentioned included washroom accessibility; fines; hours, cards for seasonal/short-term residents; parking, size of branch and aisle width.
- **Changes suggested** – A variety of changes to the way space is used at their branch were identified including circulation desk area is cramped; public computers should be separated more; need more space; more dedicated space for district supervisors; outdoor space at the branches; dedicated program space; more electric outlets; storage space and specific suggestions about their branches.
- **What's been learned with COVID** – Staff have learned to be adaptable, flexible, resilient, to work more cooperatively and to take care of each other. Various online capabilities have been improved including online training and meetings; online programming and communication with patrons. Staff also mentioned the ability to help individual patrons and believe the patrons learned how important the Library is.
- **Recommended changes beyond COVID** – Staff would recommend continuing with plexiglass screens; physical distancing; and having higher sanitization standards.
- **Recommendations for internal communications** – Staff would like to see more opportunities to learn together and share information; having more district meetings; more Teams (online) meeting and updates. There is a perception that casuals are often 'left out of the loop'. It was suggested there should be more searchable procedures, forms and information; branch tours; training at the MakerLab to understand and promote what is there. There was also a suggestion of having a full staffing complement to help with communications.
- **Safety** – All but 3 staff feel safe and secure in their work environment. There were a couple of mentions of concerns about feeling safe when working after dark.
- **Satisfaction with the work environment** – 75% of staff are 'very satisfied' and 21% 'somewhat satisfied'. One person was 'somewhat dissatisfied'. Suggestions to improve funding included providing more IT and supervisory support; providing more staffing time; more hours open; more dedicated office space to manage staff; more space; more communication; filling vacant positions; have one or two staff in each district who can help with running branches when the DS is busy.
- **Comments on marketing and communications** – There needs to be greater promotion of the Library on social media, YouTube and have more staff involved. There needs to be another position to help with marketing. It is challenging to reach out to new people,

but communications are good with existing patrons. Fill the Community Librarian position and improve the website.

- **Keep Library as is or change it?** Need a Program Coordinator so branches can share programs, or fill the Community Librarian position. Use branch staff to take pressure off administration. An additional District Supervisor could do social media or redistribute the branches to 4 district supervisors and move makerspaces to the branches. Other suggestions included double staff resources at the branches; merge some branches, have bigger spaces, update or provide new branches. One suggested having 6 branches, one in each municipality.
- **Branch specific comments** – Specific comments included providing an accessible washroom at Chesterville; providing storage and taking advantage of the potential at Finch MakerLab; providing parking for seniors at Iroquois; expanding the space at Lancaster; improving the lighting at Long Sault; providing more programming at South Mountain; and planning for a growing community at Winchester.
- **Branches no longer needed?** – One staff suggested there should be one branch for each municipality; other comments: North Stormont doesn't need 3; some branches are poorly used and close to better ones; Chesterville (problems with building plus close to Winchester); Williamsburg (location and proximity to Morrisburg); and Avonmore.
- **Future Branches?** – have a central branch including Admin offices near S&N Stormont boundary; Glen Walter; Hallville, Martintown, Moose Creek; combine Lancaster-Williamstown in a new branch
- **Ways to increase community engagement?** – More Library pop-ups – events, busy locations, workplaces, arenas, high schools; regular newsletters to patrons; reach out to groups, have demographic-specific programs
- **Community groups or organizations to partner with?** – Suggestions included local schools; encourage ad-hoc groups at local branches, e.g. puzzles, knitters; organizations helping people struggling with financial stability, safety; Early Years Centres; Seniors' centres; fundraising efforts with local service clubs; environmental groups; LGBTQ2SIA+ groups; newcomers; literacy groups; Tourism and Economic Development
- **Comments about relationship with the County** – most think it is good, several don't have an opinion; question why in basement of County building, have to follow County policies; some desire for more separation, separate space for Admin
- **Comments about relationship with local municipalities** – Different based on the municipality, some are better than others at facility management and maintenance; not

always prompt dealing with maintenance requests, snow removal; Library could help with municipal services, e.g. sell dog tags, garbage tags, if distant from township office

- **Alternative library services? (e.g. express depots, holds lockers, book kiosks) Where? –** Express depots – Morewood, Newington, Moose Creek, Dalkeith, Brinstone, Glen Robertson, Riverside Heights, Ault Island, Apple Hill, Jean Coutu strip mall, other small communities; Lockers at branches with few open hours; Little free libraries, community pantries; mobile service to homebound seniors, hospital
- **Final comments** – Love my job, colleagues, we have a great Library system (several); would like good change for cohesive system, set standards, shared services; would like diversity, equity training to serve marginalized communities; Library needs to raise profile in community, use of campaigns; need to fill Admin positions; thanks for asking our opinion, should do it more often.

## 2.6. Benchmarking Assessment

Ontario’s public libraries report usage and related statistics to the Ministry of Heritage, Sport, Tourism and Culture Industries on an annual basis, which allows for some comparisons that are of interest to libraries and their funders. As public libraries’ response to the pandemic has varied widely since 2020 according to the requirements of their local health units and their ability to respond to service changes, the data set used here is from 2019<sup>1</sup>.

Many factors can affect the variation in library data, such as the size and condition of the library building, which can affect both costs and ability to provide programming and accessible space. Some municipalities provide in-kind services such as financial, facility, and IT services, which may or may not be accounted for in the costs. Low investment by the funders, affecting staffing levels, hours of operation, and materials budget, will result in commensurately low outputs of material circulation and program attendance. Quantitative measures are just one way that a library can demonstrate its value. Qualitative measures are indicated elsewhere in this report through the stakeholder interviews and staff surveys.

The “per capita” measure uses the population of the municipality and does not include residents of other municipalities who may use the libraries through reciprocal borrowing agreements.

For many county libraries, the lower-tier municipality owns and operates the local branch facility, and the financial arrangements range widely for this partnership in providing library service to the local community. For example, in Wellington County, the County owns and operates all the branch facilities, while in some cases, the local branches are entirely the

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<sup>1</sup> Data from Ontario Ministry of Heritage, Sport, Tourism and Culture Industries, Ontario Public Library Statistics, see: <http://www.mtc.gov.on.ca/en/libraries/statistics.shtml>

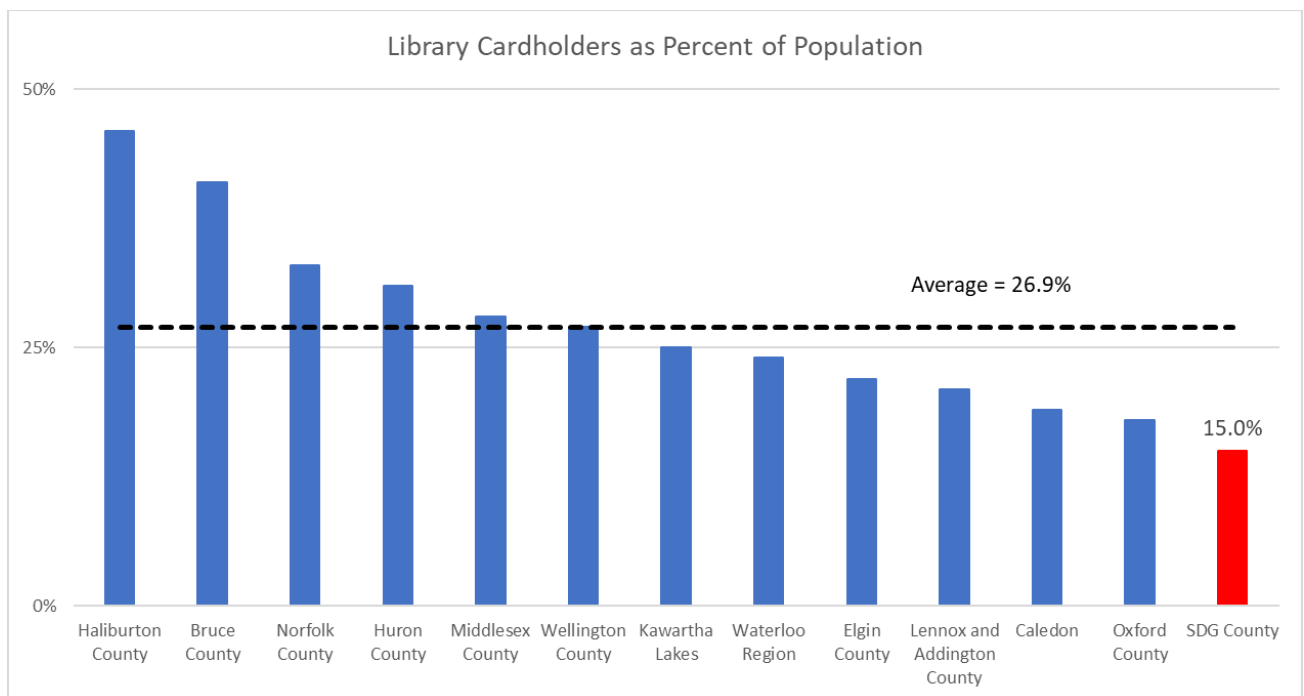
responsibility of the lower-tier. Many county library systems pay some rent, maintenance, or lease to the lower-tier municipality or a third party for the branch space, including SDG Library.

The public libraries selected as comparators include:

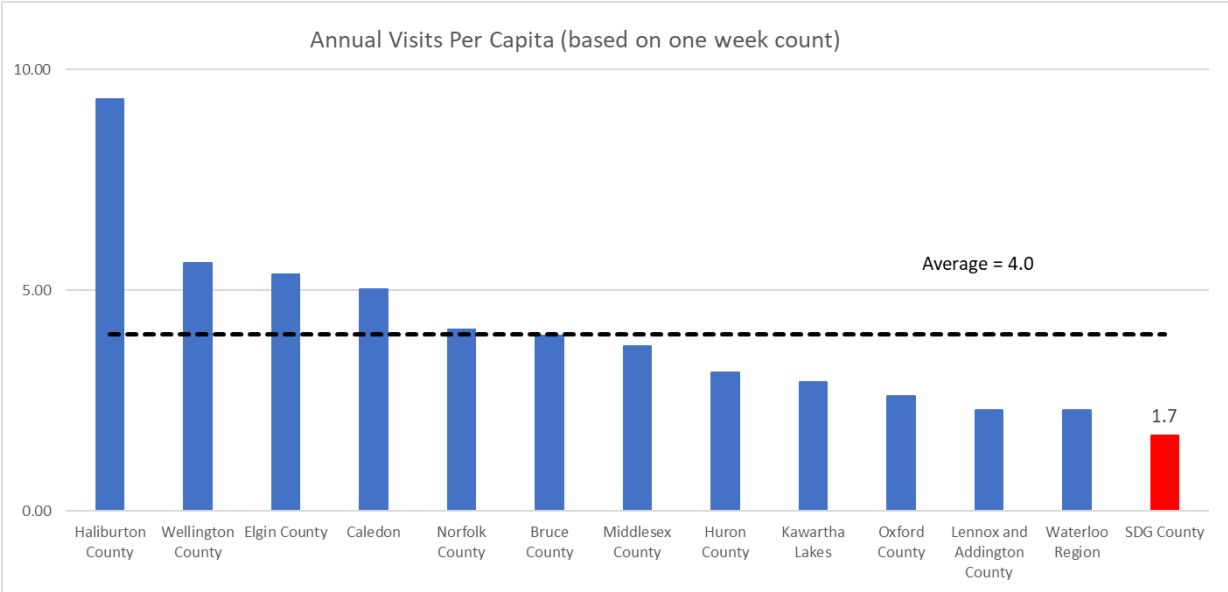
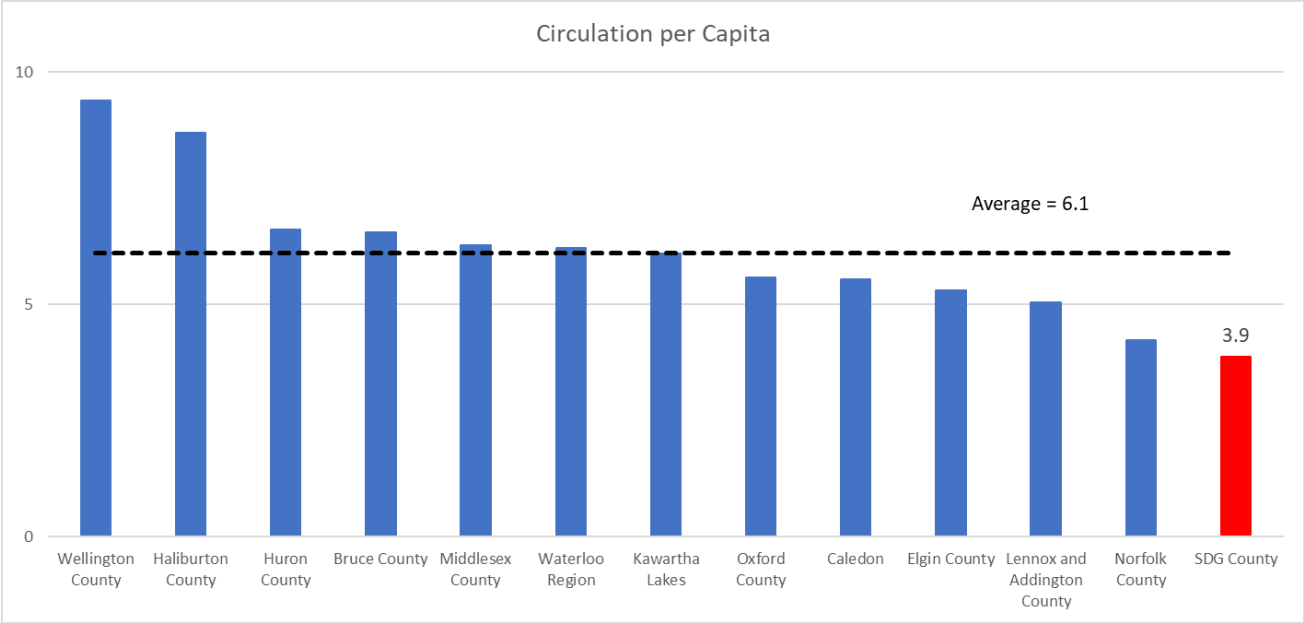
- |                               |                                   |
|-------------------------------|-----------------------------------|
| Bruce County Library          | Lennox & Addington County Library |
| Caledon Public Library        | Middlesex County Library          |
| Elgin County Library          | Norfolk County Library            |
| Haliburton County Library     | Oxford County Library             |
| Huron County Library          | Waterloo Regional Library         |
| Kawartha Lakes Public Library | Wellington County Library         |

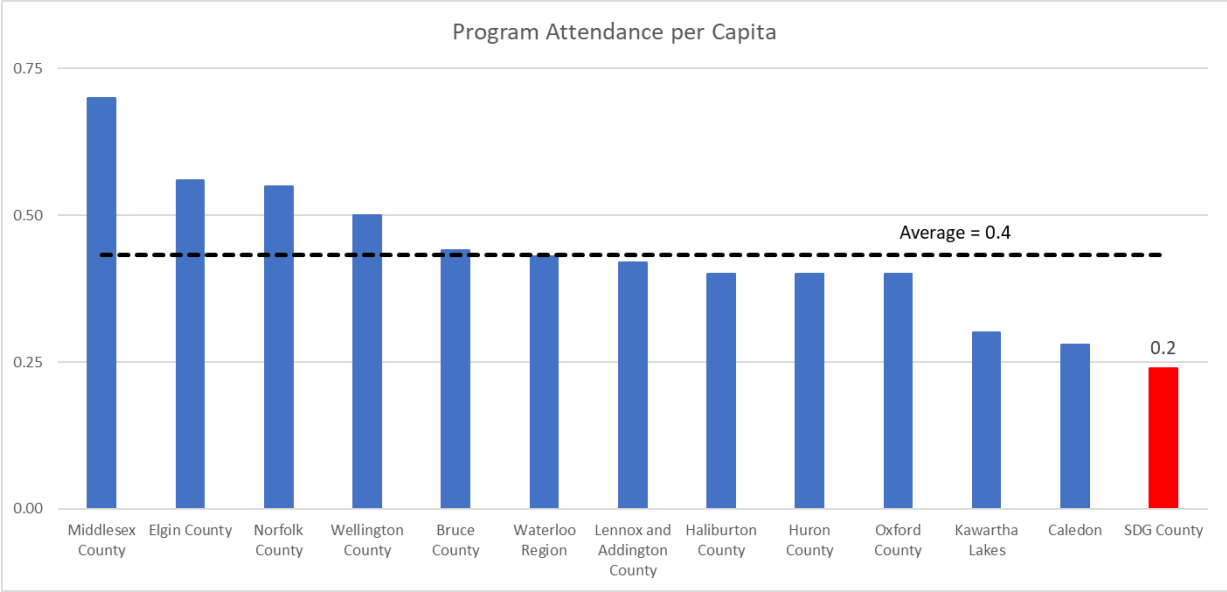
They were selected by the SDG Library as similar in size or configuration. Many of them have a city library adjacent to or within the library’s service area such as Cornwall is to SDG library, but not part of the county library system.

Generally, benchmarking compares community use of the libraries, as demonstrated by the percentage of the residents who have active library cards, as defined by used within the past two years, and the visits to the library. Charts use “per capita” to allow for variations in population by standardizing the measures.



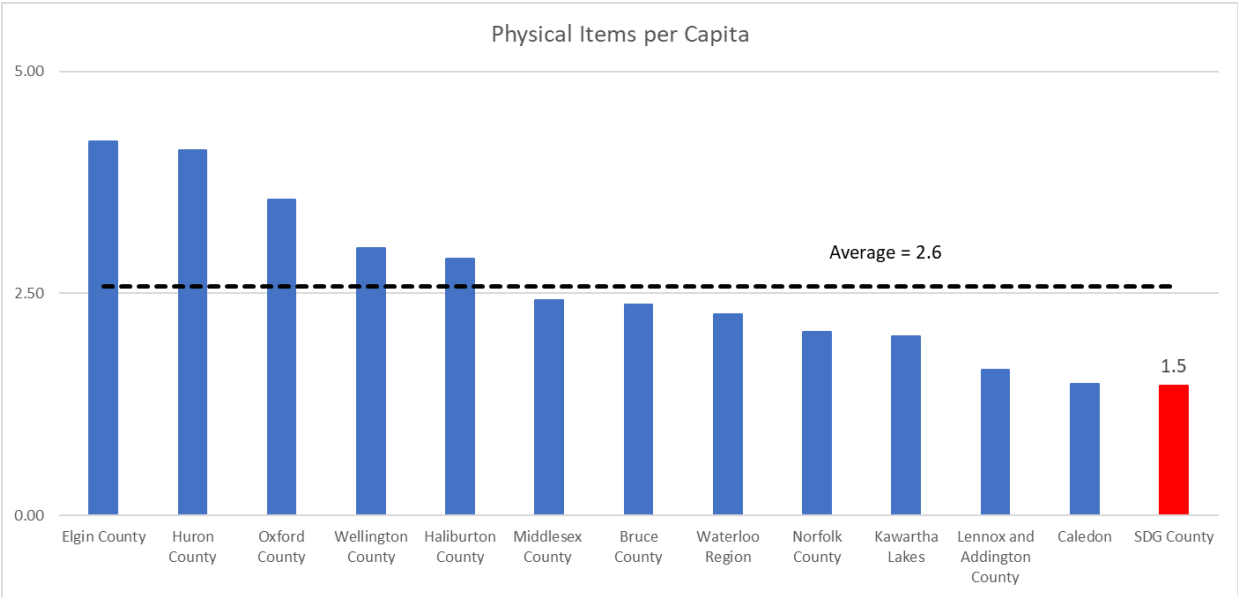
Note that libraries vary in how they manage card renewals. Some have automatic renewals.



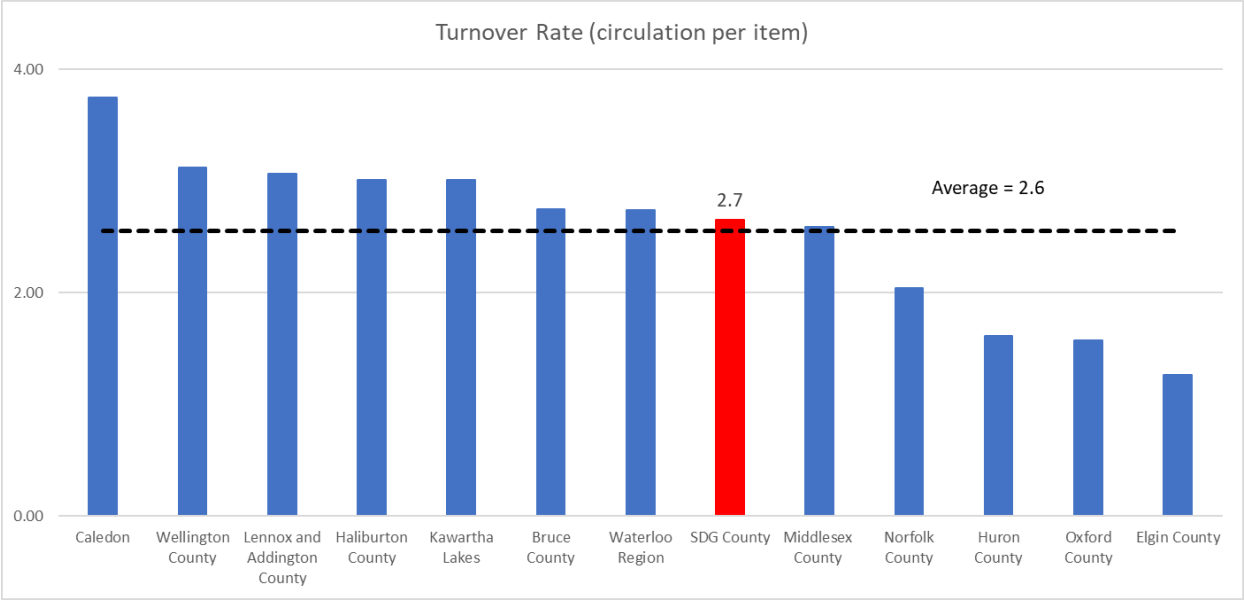


The above charts indicate that SDG Library lags far behind its peer library systems in Library use by the community.

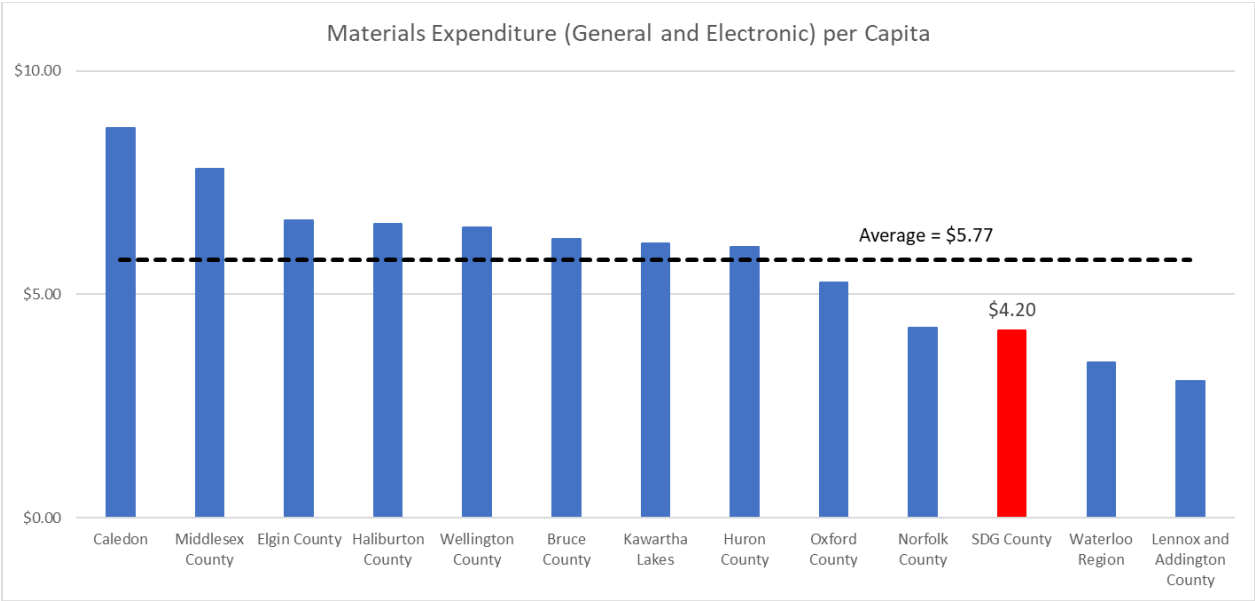
The following two charts are reflective of the Library’s collection of materials, specifically the physical collection of books, DVDs, and CDs, which are the browsing collections at the branch libraries.



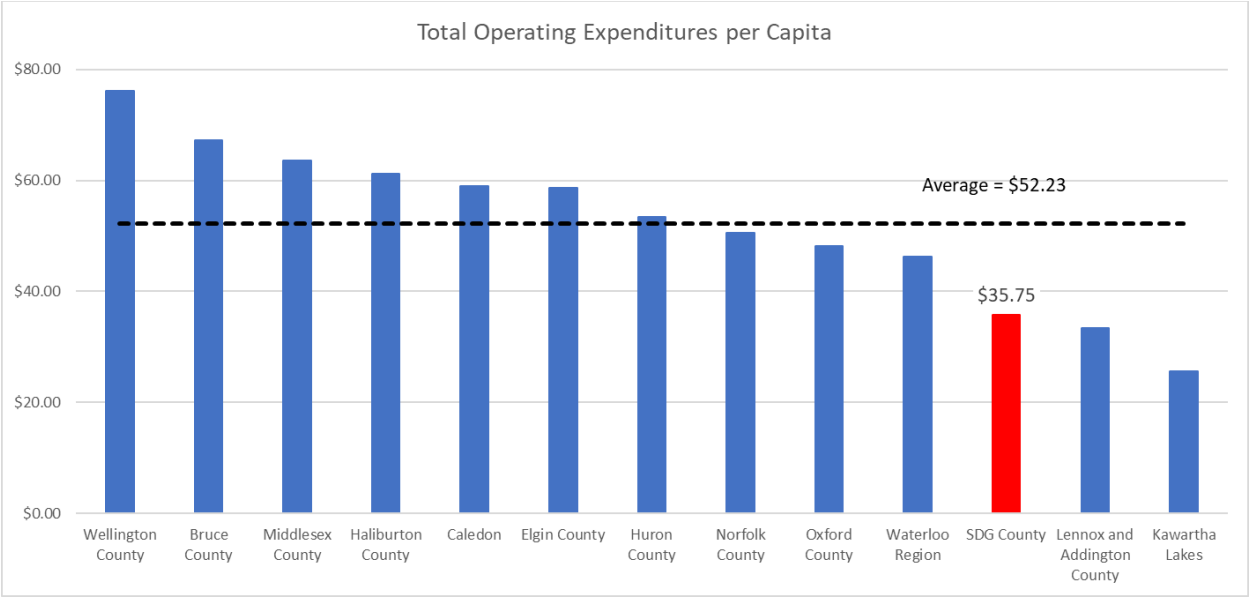
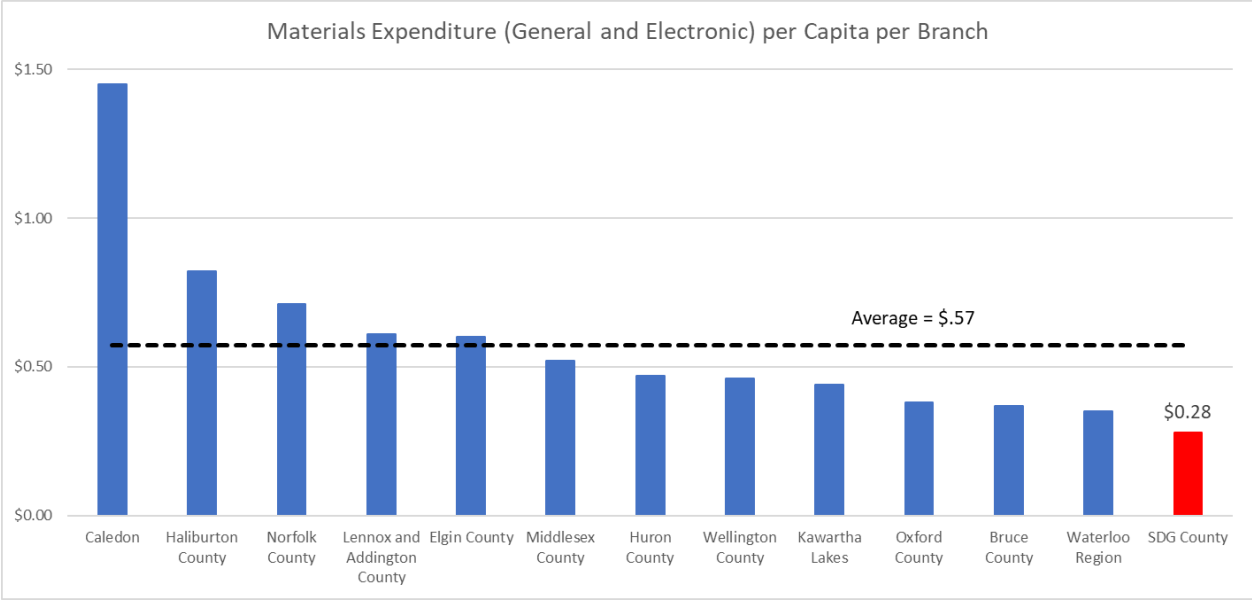
The low number of items per capita can be a reflection of a low materials budget or lack of space to keep an extensive collection.



Turnover rate is often considered a measure of the popularity or quality of the collection. This is the only metric where SDG Library is above the average of its peer libraries.

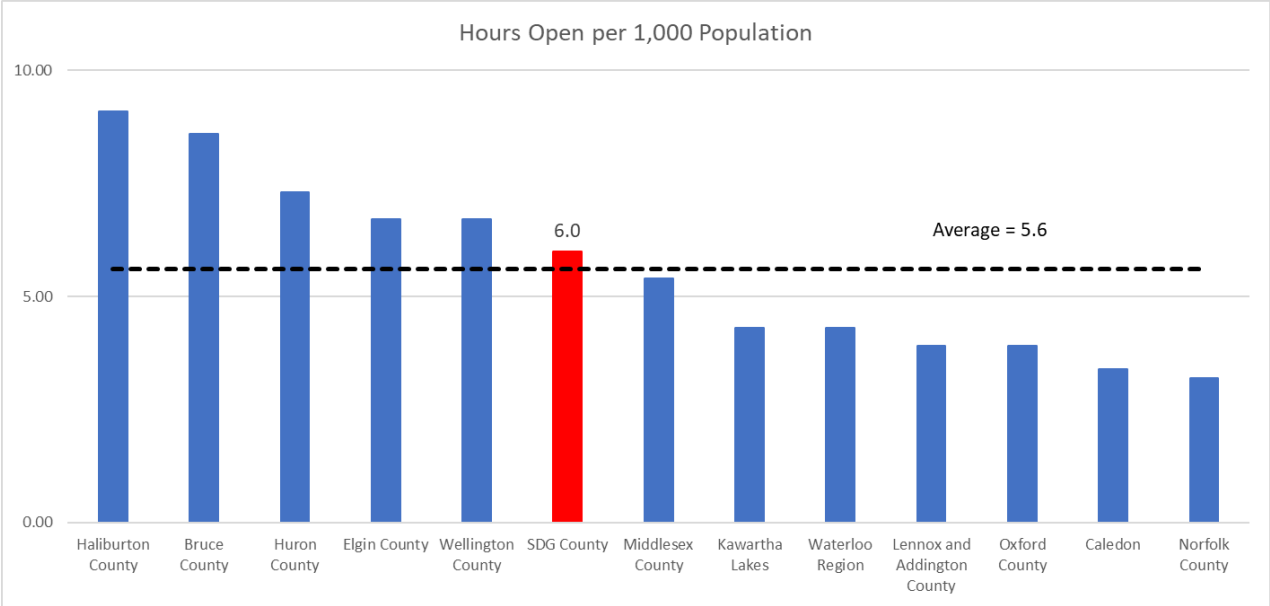


The number of branches in a library system also has an impact on the materials expenditure as the more branches, the wider the selection of materials and need for multiple copies of popular materials. This can be somewhat mitigated with a frequent courier and delivery system between branches to move holds of materials around (as SDG Library has), and all of these multi-branch library systems have that, too.

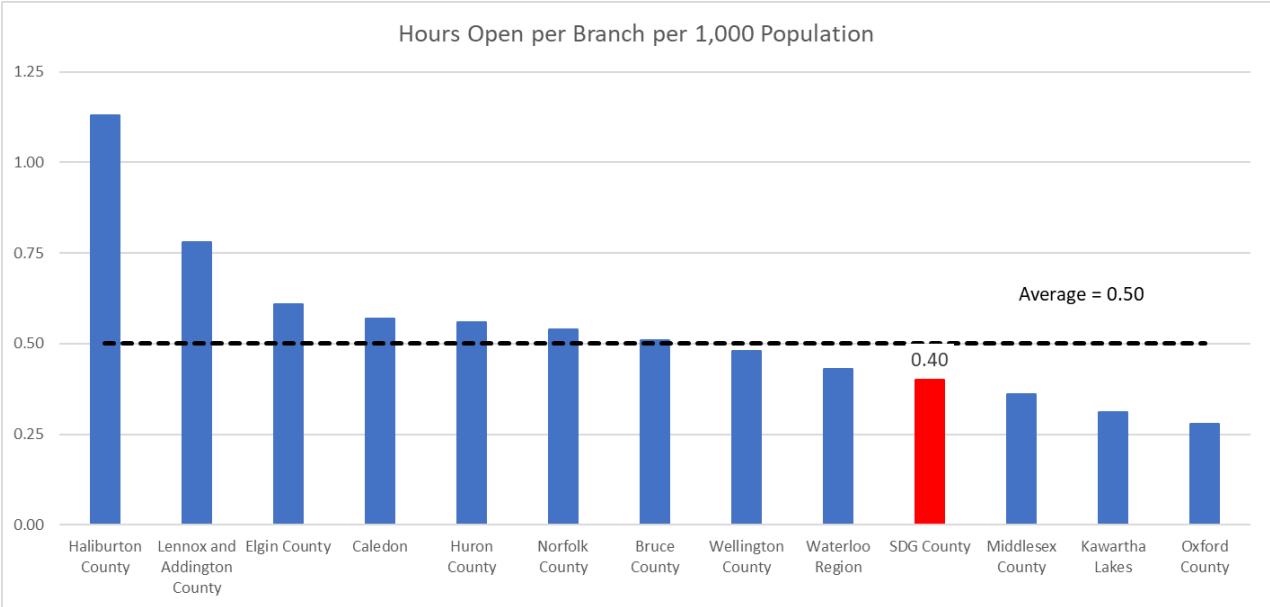


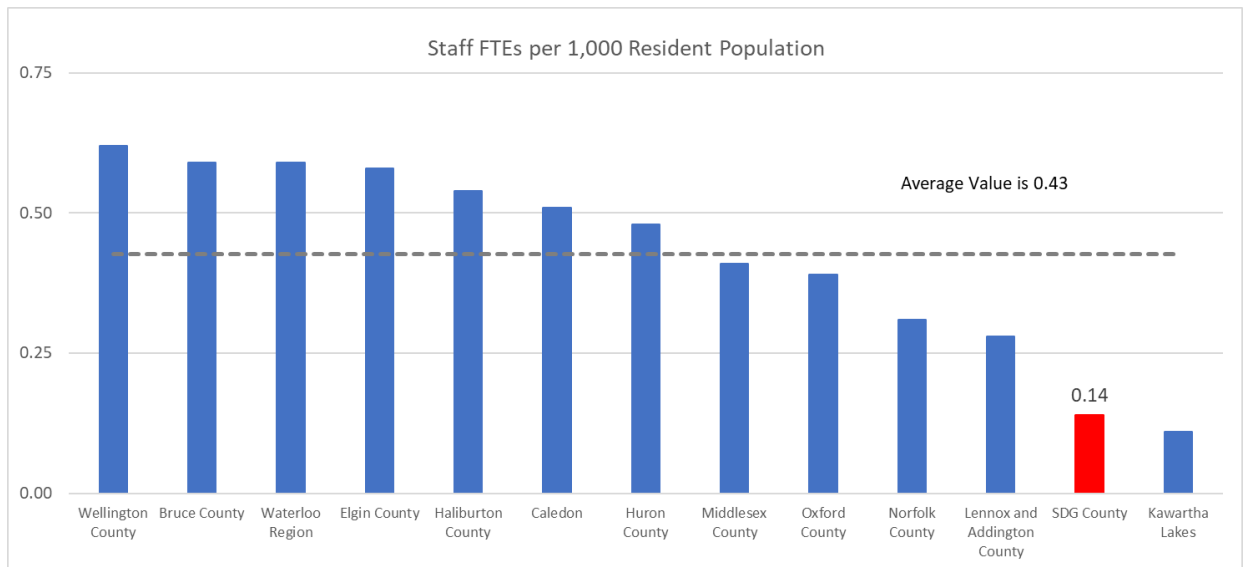
It should be acknowledged that some libraries bear the full cost of the branch facilities and in some cases, the local municipality bears some or all of the facility costs. SDG Library pays market value for leased facilities from the local municipalities.



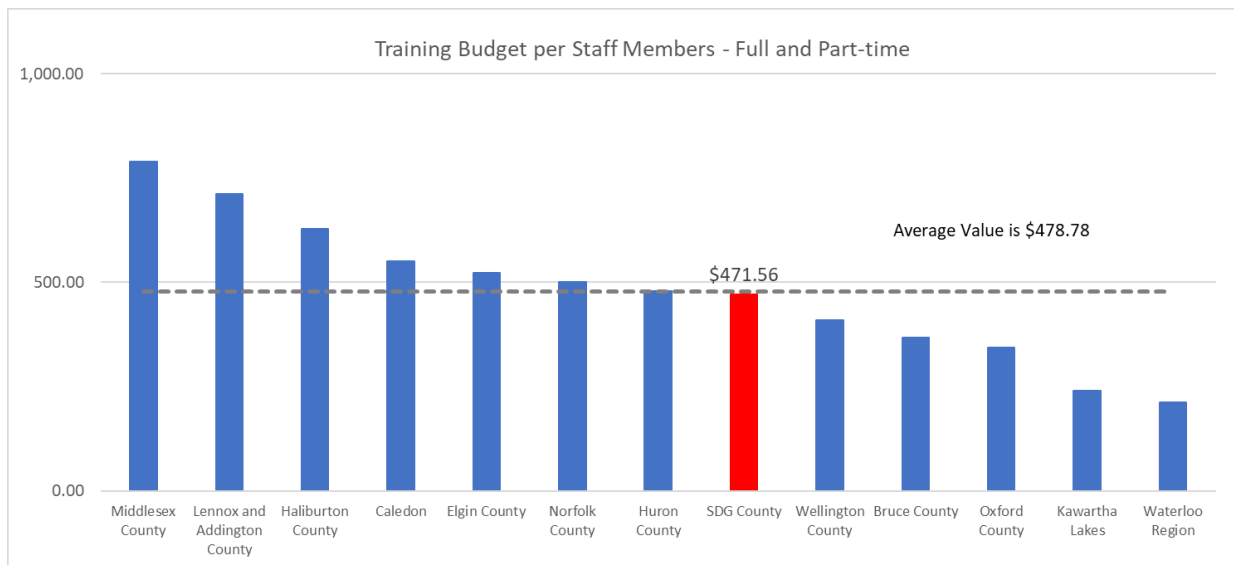


SDG Library is slightly above average in the number of hours open to the public overall, but if one considers the number of branches (below), the hours are spread thinly among the branches.





Again, SDG Library is significantly below its peer libraries in staffing numbers. This can have an impact on staff available to offer programming, and on staff burnout and recruitment issues.



SDG Library is slightly below average on expenditures on staff training. It is important to remember that staff are trained individually, not as full-time equivalents. Compared to all the other metrics above, staff training investment and quality of the library collections are the most successful of SDG’s indicators.

### ARUPLO Guidelines

The Guidelines for Rural/Urban Public Library Systems are a developmental tool for rural/urban and county libraries. The Guidelines are expressed as targets for a library to provide an appropriate level of service for its community. The third edition (2017) was used for the

following exercise. A fourth edition is in development and early findings suggest that there will not be many changes.

While this Library Service Review is not a facility review, the branch libraries are a key component of SDG Library and need to be assessed for their role in library service.

The ARUPLO Guidelines assign branches based on catchment area and population served. This can be determined by census data, planning department information, and information collected by library boards. In addition, some branches may have additional roles, such as being a resource library for a wider area, hosting a MakerSpace, or a local history collection.

The following is the definition for branch libraries, according to the ARUPLO Guidelines.

Small branches	Generally serve catchment areas of up to 5,000 population
Medium branches	Generally serve catchment areas of 5,000 – 10,000 population
Large branches	Generally serve catchment areas of 10,000 – 35,000 population
Urban branches	Generally serve catchment areas 35,000 or more population

For this service review, rather than start from the size of the Library, the local community’s use of the Library was used to determine the catchment population of the branch library. Admittedly, the size of the library can affect its use, for example, if the library is too small to house an adequate collection of materials, borrowing will be low.

The allocation of population which follows was based on the percentage of active Library cardholders and percentage of circulation of physical materials at each branch. Highlighted branches are the Resource Branches.

Branch	Size (sf)	Approximate Population Served
Alexandria	2,565	10,634
Avonmore	1,170	2,788
Chesterville	1,123	3,670
Crysler	906	3,014
Finch	1,036	1,576
Ingleside	2,551	6,462
Iroquois	1,128	3,715
Lancaster	959	5,092
Long Sault	1,631	5,620
Maxville	1,353	2,081
Morrisburg	2,010	6,408
South Mountain	1,417	2,925
Williamsburg	851	2,221
Williamstown	1,500	2,290
Winchester	2,304	6,503

Using the ARUPLO definition of branches above, the branches of the SDG Library would be classified as follows based on population served:

Small	Avonmore Chesterville Crysler Finch Iroquois Maxville South Mountain Williamsburg Williamstown
Medium	Alexandria Ingleside Lancaster Long Sault Morrisburg Winchester

In the following table, the branches are measured against the ARUPLO guidelines for the category. Note that the Guidelines are provided as a range so that a library system can adjust their service levels for branches close to the edge of the category. Also, branches may require additional resources if they have a special role in their library system, e.g., local history, MakerLab, Resource Branch, supervisory staff.

#### Small Branches compared with ARUPLO Guidelines

	Space 2,500 – 5,000 sf.	Hours of Operation 20-25 per week	Collection Size 6,000 – 12,000 items
Avonmore	1,170	18	5,555
Chesterville	1,123	17	6,492
Crysler	906	20	6,328
Finch	1,036	18	2,155
Iroquois	1,128	20	7,160
Maxville	1,353	16	6,570
South Mountain	1,417	16	5,832
Williamsburg	851	16	4,036
Williamstown	1,500	17	5,442

Of SDG’s small branches, none meet the space guideline, two meet the hours of operation guideline, and four meet the collection size guideline.

### Medium Branches compared with ARUPLO Guidelines

	Space 5,000 – 10,000 sf.	Hours of Operation 25-45 per week	Collection Size 12,000-24,000 items
Alexandria	2,565	44	14,348
Ingleside	2,551	44	9,212
Lancaster	959	44	6,825
Long Sault	1,631	30	8,320
Morrisburg	2,010	44	7,837
Winchester	2,304	44	9,929

Five of the Medium Level branches (Alexandria, Ingleside, Lancaster, Morrisburg, and Winchester) also have a role as Resource Branches for the SDG Library system. All of the Medium branches meet the guideline for hours of operation, one meets the collection size guideline, and none meet the space guideline.

Earlier in this section, the comparisons of the SDG Library with similar library systems across Ontario indicated that SDG Library lags far behind on many factors, such as percentage of the population with library cards, circulation, program attendance and number of materials.

The comparison with the ARUPLO Guidelines above show that the size of the library facilities is a serious weakness in the Library system, and a disconnect between the local municipalities responsible for providing library space and the County, responsible for providing the materials, programming, and staffing.

## 2.7. Situation Analysis

### 2.7.1. SWOT Assessment as the Basis for a Situation Analysis

A Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis can provide the basis for a service review. Different elements (strengths, weaknesses, and so on) will logically imply different types of strategic actions and initiatives, as shown in the chart below:

	How Defined Strategically?	Strategic Actions
<b>Strengths</b>	<ul style="list-style-type: none"> <li>unique or very strong factors that provide current competitive advantage</li> </ul>	<ul style="list-style-type: none"> <li>protect an advantage</li> <li>further develop or capitalize upon an existing advantage</li> </ul>
<b>Weaknesses</b>	<ul style="list-style-type: none"> <li>areas of current competitive disadvantage relative to competition</li> </ul>	<ul style="list-style-type: none"> <li>strengthen areas of weakness</li> <li>reposition to eliminate weakness (in reality, or through the creation of alternative perceptions)</li> </ul>
<b>Opportunities</b>	<ul style="list-style-type: none"> <li>situations that present opportunities for future competitive advantage</li> </ul>	<ul style="list-style-type: none"> <li>feasibility testing</li> <li>implementation planning</li> </ul>
<b>Threats</b>	<ul style="list-style-type: none"> <li>situations that present dangers of future competitive disadvantage</li> </ul>	<ul style="list-style-type: none"> <li>risk assessment</li> <li>contingency planning</li> </ul>

Strengths, weaknesses, opportunities and threats were identified through the various data collection activities undertaken. These are represented in the chart below, using a check mark when the theme is represented. **For the interviews and surveys**, a checkmark (✓) was only indicated if a significant portion of the respondents indicated the factor. This system was not used for the 'benchmarking' and 'consultant judgment' columns where a simple 'yes or no' (presence or absence of checkmark) indicator was used. (The 'consultant judgment' is based on the collective experience of the consultant team from having examined industry trends, the input from all of the avenues previously outlined in this section, and having worked in dozens of other library systems.)

### 2.7.2. Findings and Conclusions from the SWOT Assessment

Major ‘consensus themes’ discovered throughout the consultation process are shown in the rows on the chart below (these are grouped according to ‘strengths’, ‘weaknesses’, ‘opportunities’ and ‘threats’). The main ‘lines of evidence’ (i.e. the sources of information where these themes came from, represented by the columns on the chart) were the sources of information previously described in this section: the review of background information; the community stakeholder engagement process (undertaken as preparation for the Strategic Plan); the interviews undertaken for this service review; the staff survey; the benchmarking assessment; and finally, the judgment of the consulting team. A check mark (✓) in the table indicates that the particular theme was heard or seen in that line of evidence.

<b>SWOT Perspective</b>	<b>Background Materials</b>	<b>Stakeholder Engagement from Strategic Plan</b>	<b>Stakeholder Consultations</b>	<b>Staff Survey</b>	<b>Benchmarking</b>	<b>Consultant Judgment</b>
<b>STRENGTHS</b>						
• generally very positive attitude of the community to programs and services offered		✓	✓	✓		✓
• new programs and services constantly being developed		✓	✓	✓		✓
• staff generally seen and friendly and helpful		✓	✓	✓		✓
• generally high staff morale				✓		✓
• good collections					✓	✓
• local branches seen as strong sign of community		✓	✓			✓
• generally strong organization structure						
• all policies and procedures in place, but need updating and cross-checking with OPL Guidelines			✓	✓	✓	✓
<b>WEAKNESSES</b>						
• structure of system: large geographic area with small local branches	✓	✓	✓	✓	✓	✓
• most facilities too small, crowded, non-accessible	✓		✓	✓	✓	✓
• WiFi weak or problematic in several branches		✓	✓			✓
• below average in comparison to similar systems on key metrics					✓	✓
• staff interaction suffers because of number of branches and lack of communication				✓		✓
• no succession plan in place for a system on the cusp of change			✓	✓		✓

<b>SWOT Perspective</b>	<b>Background Materials</b>	<b>Stakeholder Engagement from Strategic Plan</b>	<b>Stakeholder Consultations</b>	<b>Staff Survey</b>	<b>Benchmarking</b>	<b>Consultant Judgment</b>
• community awareness of programs and services available is weak – no Communications and Marketing Coordinator position in place	✓	✓	✓	✓		
• perception that hours of operation in many branches are insufficient		✓	✓	✓		
• separation of administrative HQ from system			✓	✓	✓	✓
<b>OPPORTUNITIES</b>						
• potential to review branches to determine opportunities for efficiencies, closure, better service, expansion			✓	✓		✓
• opportunity for a central administrative presence in a branch			✓	✓		✓
• opportunity for more targeted marketing			✓	✓		✓
• all policies need to be updated on a regular basis		✓	✓	✓		✓
• opportunity to reduce / remove fines as many other library systems have done			✓	✓	✓	✓
• opportunity to update / modernize the traditional and digital collections		✓				✓
• great interest in provision of more virtual programming		✓				✓
<b>THREATS</b>						
• branch closure in smaller communities is seen as a threat		✓	✓	✓		✓



### 3. Service Review Findings

This **Service Review Findings** section of the report assesses the results and implications resulting from analysis of the various lines of evidence described in the previous section. The structure of this section follows that of the service review itself: looking first at **external services**. This encompasses a **detailed analysis of branch distribution and utilization** and then turns to an analysis of the **collections**. **Programs and services** offered to the public are next examined followed by a review of **technology services** (as offered to the public). **Internal operations** covers **staffing and organization structure, policies and procedures, training and communications**, and, again, **technology** (from the perspective enabling staff to do what they need to do, rather than having an outward, public-facing focus). Finally, **strategic considerations** of all of the above are discussed.

#### 3.1. External (Public Oriented) Perspectives

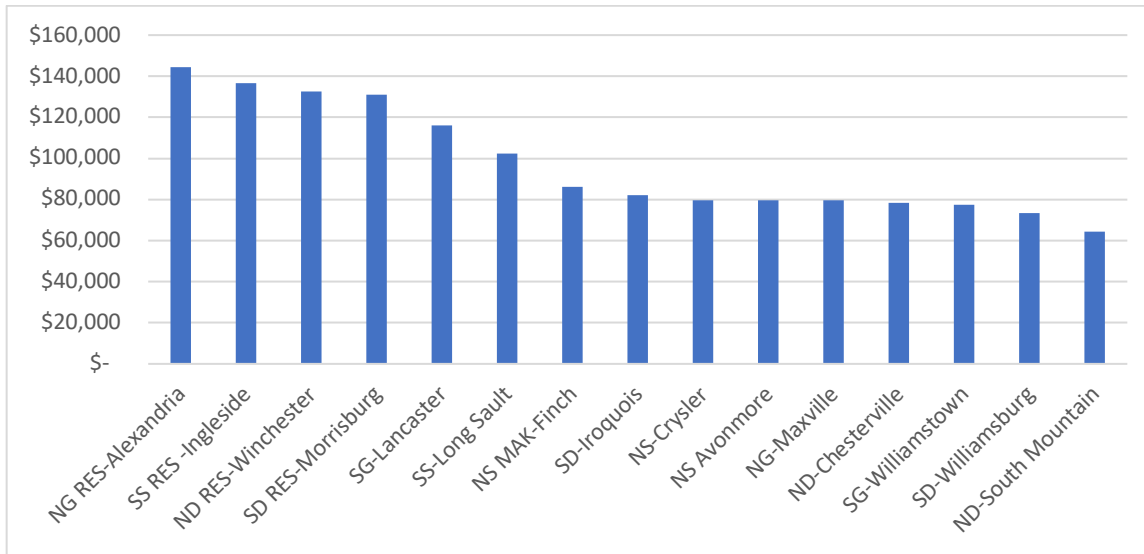
##### 3.1.1. Branch Distribution and Utilization

The table below shows a profile of key statistics for each of the 15 branches. There is considerable variation in statistics and performance when the various branches are compared. (See also Appendix 1.)

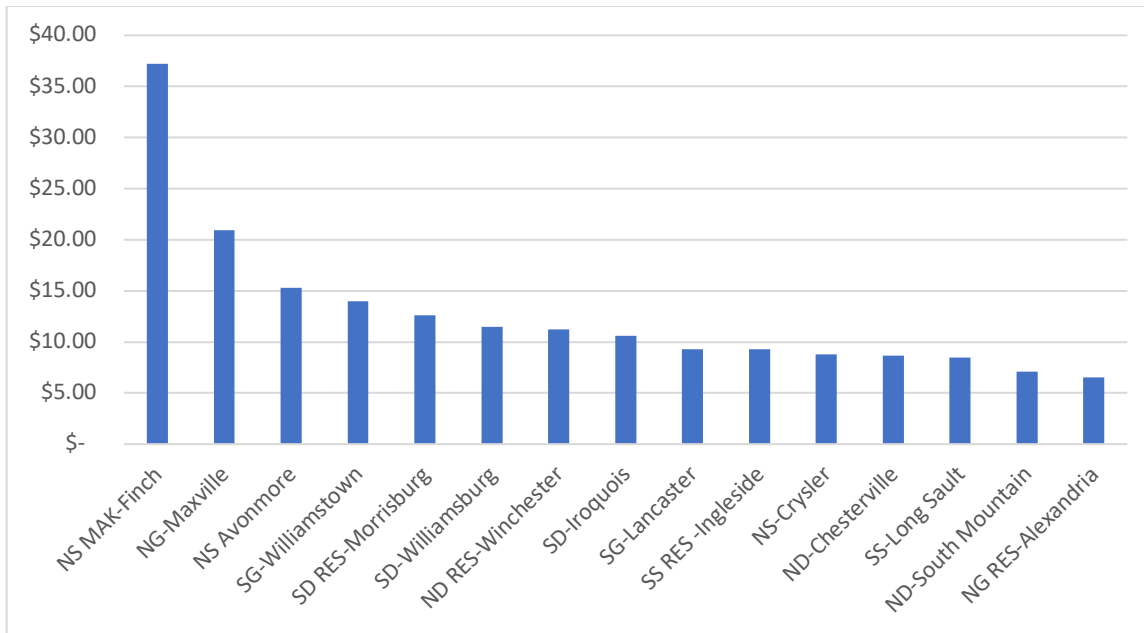
- Branch sizes range from a high of 2565 square feet (Alexandria) to a low of 851 square feet (Williamsburg)
- Cost per item circulated at each branch range from \$37.21 (Finch which is the MakerLab) and \$20.92 (Maxville) to \$6.50 (Alexandria).
- Cost per active member ranges from \$287.37 (Finch) and \$253.41 (Maxville) to \$80.44 (Alexandria)
- Cost per visitor ranges from \$138.16 (Finch) and \$71.49 (Maxville) to \$23.91 (Alexandria)

	NG RES- Alexandria	NS Avonmore	ND- Chesterville	NS-Crysler	NS MAK- Finch	SS RES- Ingleside	SD-Iroquois	SG-Lancaster	SS-Long Sault	NG-Maxville	SD RES- Morrisburg	ND-South Mountain	SD- Williamsburg	SG- Williamstown	ND RES- Winchester	Total
SF	2,565	1,170	1,123	906	1,036	2,551	1,128	959	1,631	1,353	2,010	1,417	851	1,500	2,304	22,504
Accessible	Yes	Yes	Bathrooms are not	Yes	Yes	Yes	Yes	automatic door or bathroom	Yes	Yes	Yes	Yes	Yes	door; washrooms not accessible	Yes	
Members	1,796	443	568	410	300	1,073	559	868	847	314	1,054	382	284	326	1,019	10,243
Circulation	22,226	5,205	9,055	9,059	2,317	14,769	7,763	12,478	12,110	3,804	10,373	9,051	6,388	5,550	11,790	141,938
Visitors	6,041	1,289	2,005	1,246	624	8,073	2,368	3,789	3,977	1,113	4,433	1,246	1,647	1,341	4,126	43,318
TOTAL DIRECT COSTS	\$ 114,378	\$ 49,576	\$ 48,394	\$ 49,632	\$ 56,123	\$ 106,674	\$ 51,994	\$ 86,105	\$ 72,408	\$ 49,482	\$ 100,919	\$ 34,261	\$ 43,313	\$ 47,450	\$ 102,546	\$ 1,013,254
TOTAL COSTS	\$ 144,467	\$ 79,666	\$ 78,484	\$ 79,722	\$ 86,212	\$ 136,763	\$ 82,083	\$ 116,194	\$102,497	\$ 79,572	\$ 131,008	\$ 64,350	\$ 73,402	\$ 77,539	\$ 132,636	\$ 1,464,595
COST/CIRC!!	\$ 6.50	\$ 15.31	\$ 8.67	\$ 8.80	\$ 37.21	\$ 9.26	\$ 10.57	\$ 9.31	\$ 8.46	\$ 20.92	\$ 12.63	\$ 7.11	\$ 11.49	\$ 13.97	\$ 11.25	\$ 10.32
COST/ACTIVE MEMBER	\$ 80.44	\$ 179.83	\$ 138.18	\$ 194.44	\$ 287.37	\$ 127.46	\$ 146.84	\$ 133.86	\$ 121.01	\$ 253.41	\$ 124.30	\$ 168.46	\$ 258.46	\$ 237.85	\$ 130.16	\$ 142.99
COST/VISITOR	\$ 23.91	\$ 61.80	\$ 39.14	\$ 63.98	\$ 138.16	\$ 16.94	\$ 34.66	\$ 30.67	\$ 25.77	\$ 71.49	\$ 29.55	\$ 51.65	\$ 44.57	\$ 57.82	\$ 32.15	\$ 33.81
COST/SF	\$ 56.32	\$ 68.09	\$ 69.89	\$ 87.99	\$ 83.22	\$ 53.61	\$ 72.77	\$ 121.16	\$ 62.84	\$ 58.81	\$ 65.18	\$ 45.41	\$ 86.25	\$ 51.69	\$ 57.57	\$ 65.08

The chart below shows the total costs for each branch sorted from high to low.



The chart below shows the cost per item circulated for each of the branches sorted from high to low.



Using data from the 2021 Ontario Library Statistics, it is possible to compare various indicators from SDG Library to a number of other County library systems. The table below shows a number of indicators for 8 County library systems elsewhere in Ontario, the average of each indicator, and a comparison with SDG Library. We recognize that each County system is to some degree unique and that comparisons are not perfect. Also with financial data, we caution that library systems sometimes have different ways of accounting for their facility costs. For example, some County systems own their libraries, others like SDG lease them from the municipality or other owners. Notwithstanding these differences, the following comparisons provide directional indicators of how SDG Library is similar to or differs from other county systems.

	Cardholders / capita	Physical Circulation / capita	Digital circ/capita	Program attendance / capita	Branches	Branches / 10,000 capita	Local funding / capita	Total expenditures / capita	Cost / physical circ	Cost / total circ (physical and dig)	Cost / square feet	Cost / branch	Cost / cardholder	Square feet / capita	Square feet / branch
Brant County	68%	6.2	2.4	0.64	5	1.6	\$ 72.74	\$ 72.09	\$ 11.55	\$ 8.32	\$ 108.24	\$ 443,792	\$ 107	0.67	4,100
Bruce County	40%	5.1	2.4	0.41	17	2.8	\$ 65.89	\$ 72.28	\$ 14.16	\$ 9.62	\$ 83.48	\$ 259,871	\$ 182	0.87	3,113
Huron County	29%	3.0	1.7	0.07	13	2.2	\$ 47.60	\$ 51.37	\$ 16.85	\$ 10.75	\$ 65.35	\$ 234,332	\$ 177	0.79	3,586
Lambton County	13%	2.6	3.3	0.08	25	2.0	\$ 54.71	\$ 58.81	\$ 22.28	\$ 9.91	\$ 89.47	\$ 297,911	\$ 450	0.66	3,330
Lennox and Addington County	16%	2.8	1.9	0.12	5	1.2	\$ 39.00	\$ 39.20	\$ 14.23	\$ 8.36	\$ 93.34	\$ 336,271	\$ 251	0.42	3,603
Middlesex County Library	23%	1.6	2.1	0.45	15	2.0	\$ 42.24	\$ 66.37	\$ 40.49	\$ 17.98	\$ 72.98	\$ 326,904	\$ 292	0.91	4,479
Norfolk County	36%	1.8	1.0	0.19	5	0.8	\$ 41.66	\$ 52.23	\$ 29.03	\$ 18.34	\$ 65.60	\$ 668,994	\$ 144	0.80	10,198
Oxford County	24%	4.0	2.7	0.05	14	2.1	\$ 58.67	\$ 66.23	\$ 16.77	\$ 9.90	\$ 98.26	\$ 322,038	\$ 272	0.67	3,277
<b>Average of 8 County Libraries</b>	<b>31%</b>	<b>3.4</b>	<b>2.2</b>	<b>0.3</b>	<b>12.4</b>	<b>1.8</b>	<b>\$ 52.81</b>	<b>\$ 59.82</b>	<b>\$ 20.67</b>	<b>\$ 11.65</b>	<b>\$ 84.59</b>	<b>\$ 361,264</b>	<b>\$ 234</b>	<b>0.72</b>	<b>4,461</b>
<b>SDG Library</b>	<b>14%</b>	<b>1.3</b>	<b>3.6</b>	<b>0.02</b>	<b>15</b>	<b>2.2</b>	<b>\$ 40.18</b>	<b>\$ 40.05</b>	<b>\$ 31.61</b>	<b>\$ 8.22</b>	<b>\$ 108.84</b>	<b>\$ 182,442</b>	<b>\$ 286</b>	<b>0.37</b>	<b>1,676</b>

Key findings include:

- SDG has a lower level of cardholders as a percentage of its population (14%) than the average for the other county systems (31%).
- SDG’s physical circulation per capita (1.3) is lower than the average for the other 8 county systems (3.4)
- Digital circulation per capita, which includes e-books, e-audio books, music, video and magazine downloads is higher (3.6) than the other county systems (2.2) – it is likely that many SDG users are taking advantage of the digital offerings as a priority which may contribute to lower circulation of physical materials
- SDG’s program attendance per capital is lower (0.02) than the other counties (0.3), likely caused by the lack of space to run programs in many SDG branches.
- SDG’s number of branches is higher (15) than the average for the other county systems (12.4).
- The number of branches per 10,000 capita is higher (2.2) than the average (1.8)
- Local funding per capita is lower (\$40.18) than the average of the other county systems (\$52.81)

- Similarly SDG's total library expenditure per capita (\$40.05) is lower than the average (\$59.82)
- Cost per physical item circulated (\$31.61) is higher than the average (\$20.67)
- Cost per square foot of library space is higher (\$108.84) than the average (\$84.59)
- SDG's cost per branch is lower (\$182,442) than the average of the other County libraries (\$361,264).
- The total cost per SDG cardholder (\$286) is higher than the average (\$234)
- The square feet per capita of library space (1,676) is lower than the average (4,461) for the other county systems.

The above data shows relative to other county libraries, SDG has a large number of small branches. It lacks space to do programming. Its library space is relatively expensive. With small collections in many branches, it would appear that users are taking advantage of SDG's digital offerings (more so than users of other library systems).

While not the focus of this study, it is possible that SDG should have fewer, better libraries serving larger numbers of people. It would benefit from a more robust study of SDG's Library facilities with a view to providing more efficient and effective services.

### **3.1.2. Collections**

The physical collections (books, DVDs, CDs) are highly valued by library borrowers as indicated in the stakeholder findings. Specifically mentioned is the interbranch courier service which delivers requested materials between branches. Materials are refreshed to remove items from each branch which haven't been borrowed in three years. These are either reassigned to another branch or removed from the collection if they are deemed out of date. The statistics also indicate that SDG Library has a good turnover rate of its collection, which is a measure of the number of circulations per item. This is an indicator of the popularity of the collection.

The benchmarking statistics indicate that SDG Library has the lowest number of physical items per capita (1.5) of the thirteen libraries compared with Elgin County the highest (4.2) and an average of 2.6. This can sometimes be a result of inadequate space. SDG also has a low materials budget per capita, especially when the number of branches is taken into account.

When the study team visited all the branches of the SDG Library, they observed that the collections were tidy and attractively displayed. Book club kits, Homework Helpers Curriculum Kits, and Ready to Read backpacks offer curated added value to the collections. Express Library depots provide direct delivery of materials in three small remote communities.

Like many other libraries, SDG has a broad collection of electronic resources. Unlike the physical materials above, they are available to everybody who has good Internet access at home or work, and do not require branch physical space or travel to branches. This was particularly appreciated by the community during lockdowns during the COVID-19 pandemic. Some examples of the electronic resources available are:

- cloudLibrary – eBooks and e-audiobooks – over 200,000 titles
- Flipster and Pressreader – 30 online magazines and over 7,000 newspapers
- Kanopy – video streaming
- Mango Languages
- Several other reference resources.

### ***3.1.3. Programs and Services Offered to the Public***

Like many other libraries, programs were greatly affected by the pandemic at the SDG Library. Virtual or on-line programming was offered via YouTube and social media. Recovery of in-person programs at the branches has been gradual. The SDG Library is continuing to offer virtual programs via Zoom which are popular among remote residents across the region. Again, the lack of space at the Library branches affects the programming available. For example, some branches are unable to host class visits as their occupancy load is less than a class size.

The SDG Library also offers a broad range of services, including a MakerLab and Library of Things. Particularly popular are the wifi hotspots, with a waiting list to borrow the 30 units. Other non-traditional items include musical instruments, energy meters, and exercise kits. The MakerLab and Library of Things are located at the Finch Branch and have dedicated “maker expert” staff. 3D printers are located at three other branches, and some programming with the MakerLab equipment takes place at various branches as well on a mobile basis. Basing the MakerLab at the Finch Branch was an effort to revitalize an underutilized branch central in the Counties.

Library staff also provide services such as Commissioner of Oaths, exam invigilation, and computer training. All branches have computers with Internet and iPads available for the public and wifi for people to use their own devices.

Library programs, services, and collections are promoted via the Library’s website, social media, and an excellent quarterly publication, The Navigator, which is available in print at the branches and online.

### ***3.1.4. Technological Resources Offered to the Public***

During challenging times from pandemic restrictions, SDG Library management applied creative and nimble solutions to continue the delivery of its programs and services and is openminded to future possibilities offered by technological change. The Library can explore the use of technology to add service and showcase cutting edge technologies while promoting access, digital literacy and equity.

**CURRENT TECHNOLOGY** – SDG Library offers popular programs and services to the public and its branches act as community hubs and bulletin boards.

**Services** include new computer workstations, print/copy/scan service, wireless internet access, online membership/renewal, 3D printers at four branches, new iPads at resource branches, Library of Things with musical instruments, mobile hotspots, makerspaces, in-branch video gaming devices, and three Express Library Depots for holds pickup.

SDG Library launched a YouTube channel with “how to” videos, information services, and a soft launch for digital services cloudLibrary. It was advertised with a link on social media and provided virtual support during the pandemic.

The **BiblioCore** discovery layer <https://sdglibrary.bibliocommons.com> includes user ratings and reviews, display of booklists and promotions, and direct downloading of digital media including cloudLibrary ebooks and audiobooks, Flipster magazines, Press Reader newspapers. It serves as a virtual branch open 24/7 and more services can be added to enhance the SDG Library user experience. Support for the website <https://sdglibrary.ca> ends in 2023, and the Library will implement BiblioWeb as its integrated website.

**Training** continues to be an important part of promoting digital literacy. Some patrons need help with online forms, booking and downloads. SDG Library offers front-line training with a “train the trainer” model, and Library users can book one-on-one sessions with the District Supervisors at the branches. For new services like cloudLibrary, and where staff work alone at the branch, the District Supervisors oversee the schedule and provide supplemental staff. "Tech Tuesday" is a program for random drop-ins. Some training is offered by the vendor either inhouse or webinar. There is some classroom training, but tech help is more successful one on one.

Staff technology training incorporates three different skill sets. Network and hardware support are provided by County IT Services. Polaris ILS system administration and in-house support are provided by the temporary Systems Support Coordinator. Public-facing support is supplied by the Coordinator and District Supervisors and includes assistance with mobile devices and marketing of services.

**Internet connectivity** has some dead zones in rural areas, including a few branches, and the County and City of Cornwall are working on delivery of a broadband fibre network.

**FUTURE TECHNOLOGY SERVICE MODELS** – The SDG Library Strategic Plan has a goal to expand its digital infrastructure and collection, community hub and accessibility. The pandemic accelerated the growth for on demand delivery of Library resources, and mobile access. SDG Library can invest in innovative technology that serves local needs in an area with few local alternatives and promotes its value with an active marketing program.

**Technology plan** – a formal plan can provide SDG Library with a road map to align Library service goals with IT planning for maximum impact and community development. The Library’s mission and vision will shape technology programs and services and keep it on track and on task. The formal plan should assess user needs and expectations so that the technology service is used effectively. The plan provides a multi-year IT pathway and connects the frontend user interface and supporting backend systems. It can include:

- an inventory of existing technology assets
- assessment of staff skills with a plan to develop expertise
- support agreements with vendors and/or municipal departments
- annual plan and budget to add technologies to meet service goals
- disaster preparedness plan
- life cycle plan for disposal of dated or broken technologies, and their replacement
- periodic review and revision of technology needs and plans

**Emerging technologies** and generational change point to an increase for on demand service, quick response from providers, and mobile 24/7 library delivery.

- Self service options offer convenience for patrons and reduce wait time. Options include ILS apps on mobile devices for checkouts/renewals/checkins, self-check stations in the branch, charging stations, online registration for Library programs, wireless printing from mobile devices. Online assistance and quick response to queries are available to patrons with third party chat services.
- After hours access to branch - Open Access offers secure card access to Library collections after hours, a successful solution for smaller branches in rural areas. It extends opening hours for hold pickups, quiet study spots and computer workstations.

**Digital collections** can be expanded to include innovative technology collections. If smaller branches share space with patrons who want quiet areas, then loaning some of these collections could be a better solution than keeping as in-house use.

**Ongoing training** is necessary for staff as front-line service. If the Library provides basic service to patrons from trained branch staff, then partnerships can be formed with organizations such as colleges or community-based literacy centres to offer expanded courses. Training could be provided by high school volunteers after formal training by Library staff. Additional content can be added to video channels and tutorial services.

**Outreach** options can promote technology beyond Library walls with a pop-up library at community events, mobile makerspace, or pop-up learning lab.

**Marketing and promotion** can showcase SDG Library’s technology programs and services to patrons and the community. Personalized marketing provides a customized selection of material and services and increases patron engagement.

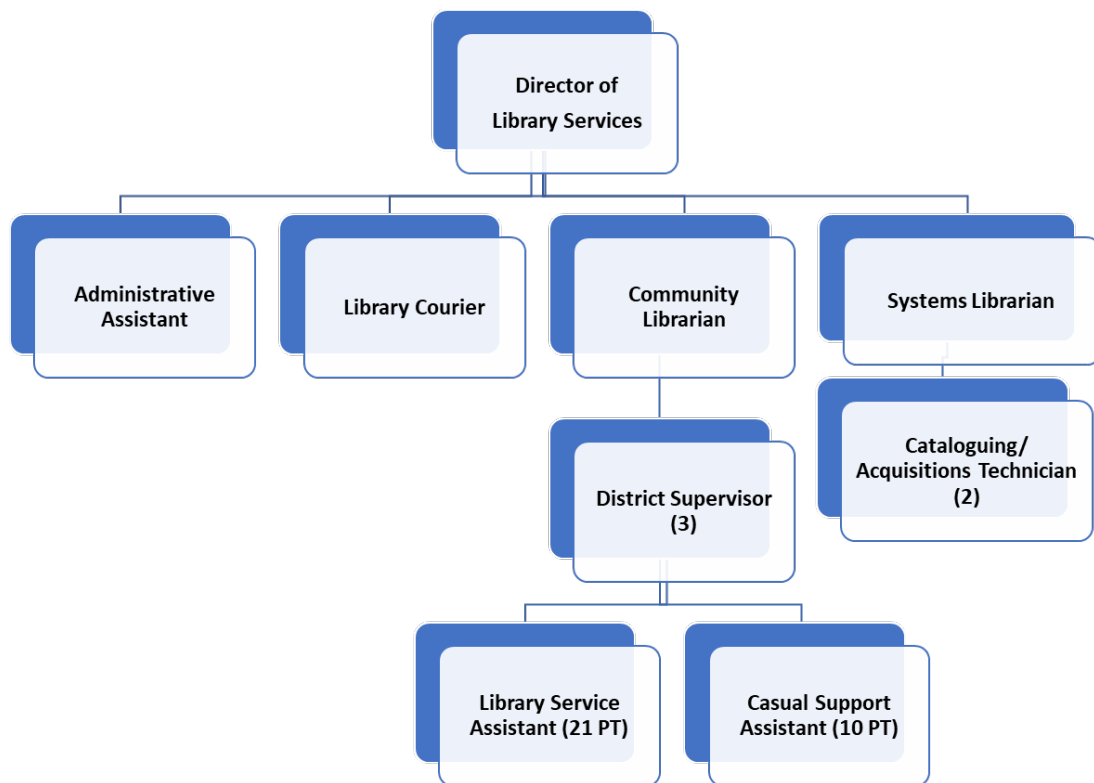


## 3.2. Internal Perspectives

### 3.2.1. Organization and Staffing

The Director of Library Services reports to the Stormont, Dundas and Glengarry County Library Board, in accordance with *The Public Libraries Act*. Additionally, the SDG Library also functions as a department of the County. As such, the Director is a member of the Senior Management Team of the County, and the County provides support services such as human resources, payroll, financial services, and information technology. For many libraries, this is a desirable model, positioning the Library well in the structure of the funding agency.

The Library's current organizational structure is as follows:



The fifteen branches are grouped geographically into three districts and the branch staff are supervised by a District Supervisor in each, who work in the branches themselves. District meetings of their teams are held regularly. This is a good team model for branch library operations. Many branch staff work alone, especially in the smaller branches.

As the branches at SDG Library are already in the small- medium range, all front-line staff are already generalists, in that they provide assistance to Library visitors including reader's advisory, reference service, and programming. This is an emerging trend and challenge for

larger public libraries but SDG and many county library branches have had this service model for a long time.

Likewise, collection development is done at many levels, including front-line branch staff right up to the Director of Library Services, based on their expertise and areas of interest. This is supported by Automatic Release Plans (ARPs) and leased best sellers, managed by the Cataloguing/Acquisitions Technicians.

At the time of this study, the key positions of Community Librarian and Systems Librarian were vacant and had been for some time. Both positions have been challenging for recruitment and retention. This may be in response to the current job market, the level of remuneration at SDG Counties, the remote location, or workload. The Library will need to address these issues. Remuneration is a challenge with pay equity compensation plans. One response can be an adjustment of the workload.

Currently, the Library is addressing the vacancies by leaving the Community Librarian position vacant until after this service review, and the Director assuming the supervisory and collection development responsibilities in addition to her own responsibilities and workload, which is unsustainable. The outreach responsibilities of the Community Librarian position have largely been dropped, or been downloaded to the District Supervisors.

The Systems Librarian responsibilities have been, to some extent, delivered by a temporary Systems Support Coordinator, a position filled through the secondment of a District Supervisor. This position is “keeping the lights” on for all the technical services. Both the Systems Librarian position and Systems Support Coordinator positions have been difficult to fill in the current job market.

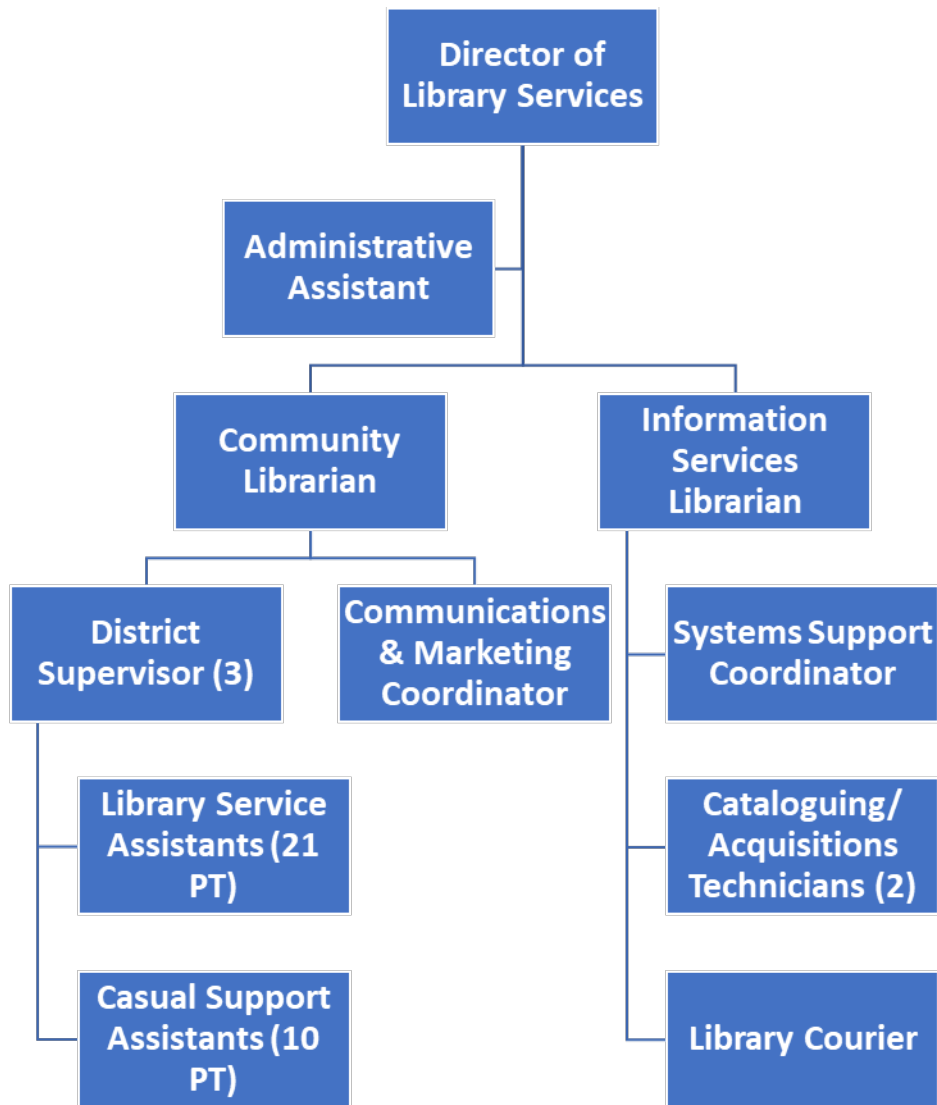
Both the Community Librarian position and Systems Librarian have the responsibility of “acting as the in-charge person as required,” though neither position is identified as Deputy Director, or second-in-command to the Director in her absence. Either of these positions could be designated as Deputy Director, based on the competencies and experience of the incumbents.

Former positions included a Systems Support Coordinator, which looked after system-wide library technologies. (Network and general IT services are provided by the County IT department.)

**It is recommended that the Systems Librarian position be renamed Information Services Librarian, with responsibilities for emerging technologies, electronic resources, technical services, and the overall Library technology portfolio. It is further recommended that the Systems Support Coordinator position be reinstated.** The System Support Coordinator will handle the day-to-day operations and troubleshooting of the Library’s systems. Together, the two positions will ensure continuous support for this essential infrastructure.

A former temporary position was the Communications & Marketing Coordinator, with responsibility for various marketing strategies, community relations, internal communications, social media, website, and the media. **It is recommended that this position be reinstated to ensure that the Library's programs and services are well publicized to the community.** Outreach should continue to be performed by the Community Librarian at the county-wide level and the District Supervisors (and Library Service Assistants) at the local branch level.

**PROPOSED ORGANIZATIONAL CHART**



### **3.2.2. Policies and Procedures**

Functioning as a department of The Counties, the SDG Library has adopted many of the County's operational policies and procedures, such as Human Resources, Financial, and IT. Specific to library services, policies include:

- Library governance policies – such as advocacy, succession planning, financial control;
- Library operational policies – such as facilities, collection development, internet use, rules of conduct.

A high-level review of the policies indicate that they are reflective of the broader public library sector.

Recently, during the COVID-19 pandemic, many libraries removed their policy to charge overdue fines for overdue materials, and have since cancelled all fines as a way of reducing a barrier to library service. SDG Library does not charge overdue fines for children's materials, and all materials can be returned to any branch of the Library system. Each November, the Library holds a "Food for Fines" amnesty week in which borrowers with overdue materials can clear their account by donating non-perishable food.

One way of ensuring that the policies meet widely accepted community expectations is to review all policies to ensure they align with the Ontario Public Library Guidelines.

Recommendations:

1. Review the overdue fines policy with a goal of reducing barriers to Library use, i.e., consider dropping overdue fines for all materials;
2. Review all policies through a customer-focused lens;
3. Do a preliminary audit comparing the SDG Library policies with the ones included in the Ontario Public Libraries Guidelines.

Again, at a high level, procedures were assessed as follows:

- The SDG Library functions as many of Ontario's county libraries do:
  - Refreshing branch library collections through exchanges, filling patron requests, and acquiring materials by staff with expert knowledge in particular collections, delivered through a frequent courier service and supplemented by Automatic Release Plans (ARPs) and lease of best sellers;
  - programs are delivered as resources permit and within the constraints of the undersized Library branches.
- It is a challenge to ensure that all staff are up to date with policies and procedures.

Recommendations:

1. Prepare an online policy and procedure manual for all staff access;
2. Develop an alert/sign off mechanism to ensure that all staff are up to date with policies and procedures.

### **3.2.3. Internal Technological Resources**

**CURRENT TECHNOLOGY** - The County IT Services department supports SDG Library's hardware, network, security settings, data backups, and provides research, advice and purchasing for the Library's IT budget. This includes the local hosting of the Library's Polaris ILS servers and Telephony, an automatic dialler. Separate vendors support printer and photocopy equipment, and County IT also reviews those contracts to benefit the Library.

The IT collaboration fosters a good municipal relationship. Library management is part of the County's IT Steering Committee, ensuring a seat at the table and knowledge about upcoming projects.

However, SDG Library struggles with inadequate staffing levels to maintain and develop technology services within the Library. If the temporary Systems Support Coordinator is absent, there is inadequate backup for software and local hardware support. At least one full-time position is needed for Library system administration and support, as well as staff to act as backup during absences. Support hours are unavailable from County IT evenings and weekends which impacts branch staff. For example, some system passwords expire every 6 weeks, requiring District Supervisors to be on call for Saturday staff.

#### **FUTURE TECHNOLOGY SERVICE MODELS**

**Systems staff** - establish full-time coverage of ILS and application support, plus backup staff. This ensures operational continuity during absence of technical support staff, emergency preparedness, service disruption due to sudden closure, and hardware failure. Succession planning should be considered for transfer of systems knowledge and skillset.

**Alternative support options** can secure redundancy for technology systems and support.

- ILS vendors offer cloud-based service. SDG Library can investigate the financial and functional benefits of moving its locally hosted Polaris ILS to a cloud service. The advantages are provision of 24/7 support, vendor responsibility for backups, software and hardware upgrades, plus contingency plans for server failure and security.
- Remote support can expand hours of troubleshooting service to the branches. The Systems Support Coordinator and District Supervisors can use remote support tools to diagnose problems at the branch libraries when County IT are unavailable.
- Polaris has additional modules to increase functionality. Offline Circulation provides circulation service if the system is unavailable. A web-based application provides access to the system from mobile locations, allowing mobile staff to register new users and provide service outside Library branches.
- Shared services with other libraries or consortia can be explored. Agreements with other Polaris libraries or consortia can offer additional support and cost efficiencies.

### **3.2.4. Training and Communications**

In a widely dispersed workplace such as a rural library system, it is a challenge to keep all staff informed and trained. Most front-line staff at SDG Library are part-time and often have no overlapping shift with other employees, i.e., they work alone. It is important to acknowledge that employees are trained on an individual basis, not in full-time equivalents.

The ARUPLO Guidelines best practices recommend that 1% of the staff wages and benefits budget be allocated to staff training. The SDG Library meets this guideline. While system-wide administrative and support staff positions require education and competencies such as Master of Library and Information Science degrees, Library Technician diplomas, and computer technical skills depending on the position, many front-line branch staff do not have or require these levels of education.

Front-line branch staff should be encouraged to participate in the EXCEL certificate program in small library management delivered by the Ontario Library Service. In order to foster a culture of internal succession and advancement, as well as excellence in leadership, senior staff should be encouraged to participate in the Advanced Public Library Leadership (APLL) Institute. (It is noted that the current Director has already completed this program.)

In-service workshops are held annually where all branches are closed for a day so that all Library staff can participate. This not only provides an opportunity for Library staff to learn something new from outside presenters, but gives them an opportunity to network with their colleagues and share ideas. This is also done at regular district meetings. Library staff also have the opportunity to meet virtually via Zoom.

The staff survey and interviews indicated a desire for more frequent meetings, Library tours, and training on emerging technologies and electronic resources.

Communications were identified as a challenge due to part-time shifts and the dispersed workplace. One suggestion was an online procedures manual and process for identifying changes and updates.

### 3.3. Strategic Considerations

As previously mentioned, the SDG Library just recently completed its Strategic Plan in April of this year. This set the stage for many of the areas considered in this Service Review. And in turn, this Service Review follows through or fits all the areas of focus of the Strategic Plan. This correspondence is shown in the following table:

Strategic Direction	Specific Elements of the Service Review that Address Strategic Action Area
<b>1. Physical and Digital Infrastructure</b>	<ul style="list-style-type: none"> <li>• this plan endorses the need for a facility review of the various branches in each municipality, ensuring a string but efficient presence in each municipality</li> <li>• technology plan component of the service review addresses digital infrastructure issues</li> </ul>
<b>2. Community Outreach</b>	<ul style="list-style-type: none"> <li>• continual development of new programs and services with strong input from the community</li> <li>• exploration of avenues for provision of services through non-traditional means that do not require bricks-and-mortar construction</li> <li>• strong new marketing orientation with accompanying staff resource</li> </ul>
<b>3. Organizational Strength</b>	<ul style="list-style-type: none"> <li>• revise organizational structure recommended, with filling in of new and previously vacated positions</li> <li>• succession plan a key recommendations with components of plan outlined</li> <li>• enhanced internal communications and networking advocated</li> </ul>

## 4. Recommendations and Implementation Plan

This final Implementation section first **summarizes all recommendations** developed over the course of the analysis. Next, a proposed **timeframe** (in the form of a Gantt chart) is presented. **Financial and human resource requirements** are next outlined, followed by suggested **targets and milestones** for each recommendation to ensure that progress can be measured and tracked. Finally, various **concluding remarks** are presented.

### 4.1. Summary of All Recommendations

(The Recommendations are listed below in terms of their overall priority and logical sequence, and not necessarily in terms of their order of occurrence in the text.)

Recommendation are discussed in 6 categories:

- A) Organization, Staffing and Succession
- B) Public Programs and Services
- C) Policies and Procedures
- D) Networking and Communications
- E) Branches and Facilities
- F) Technology
- G) Governance

#### A) Organization, Staffing and Succession

**Recommendation 1: Streamline the current organizational structure:** One of the key objectives of this study was to review the existing organizational structure. The review found that overall, the district system worked well and should be retained. However, there is some scope for streamlining the organization by reducing the number of direct reports to the CEO and consolidating some functions. A slightly revised organization structure is presented in the Report and should be implemented.

**Recommendation 2: Revise the Systems Librarian position into an Information Services Librarian position:** This revised position would have responsibilities for emerging technologies, electronic resources, technical services at the Administration Office, and the overall Library technology portfolio. This will enhance the 'Organizational Strength' pillar of the new Strategic Plan. **Reinstate the Systems Support Co-ordinator position.**

**Recommendation 3: Reinstate the Communications & Marketing Coordinator position:** It is recommended that this position be reinstated to ensure that the Library's programs and



services are well publicized to the community, which, again, is a critical pillar of the new Strategic Plan.

**Recommendation 4: Develop a specific Succession Plan:** Certain senior staff may be retiring in the foreseeable future (probably within the timeframe of the current Strategic Plan). Accordingly, a specific succession plan needs to be put in place as an immediate priority. The specific details of such a succession plan are not within the remit of this Service Review, but the components contained within it would be: **a)** review of the job description of senior positions, with a view to making any changes deemed necessary by this Service Review and the recent Strategic Plan; **b)** determination of remuneration and related benefits in light of any change in scope or responsibilities; **c)** articulation of the process to be followed in terms of announcing the opportunity, decisions as to whether internal and external candidates will be entertained, whether a search firm will be employed, etc.; **d)** determination of the likely or ideal timeframe for decision-making; and **e)** communications to staff and public around the replacement process. This is a major responsibility of the Board and should be a top priority.

## **B) Public Programs and Services**

**Recommendation 5: Continually develop new programs and services:** The consultation process revealed very high regard overall for the public programs and services offered by SDG Library. (There were, naturally, some specific suggestions made for improvements to existing programs). The community appears to respond well to new programs and services that cater to community need, and thus the recommendation here is simply to continue to innovate and provide programs and services that respond to community need. This is an ongoing process of consultation with Library users and the general public regarding what programs are desired, and then determining how and where programs and services are most desired.

**Recommendation 6: Review hours of operation at all branches:** The stakeholder consultations undertaken as part of the Strategic Plan revealed several comments at specific branches that indicated that the hours of operation offered were thought to be insufficient, or not optimal for that particular location. A review of hours of operation each branch with a view to: a) determining whether or not the existing hours were best for the community (or whether some other configuration of the same number of hours might be more desirable); and b) whether there is a compelling case to be made for more hours to be offered at each branch, should be undertaken.

**Recommendation 7: More active but targeted marketing program:** As is the case with other library systems, 'lack of awareness of programs and services' is often cited as an issue by the general community, and even very frequently by Library users. However, rather than just 'more marketing', the recommendation here is to be highly selective in the use of marketing resources where they are most likely to be of greatest benefit. Key target segments should be: newcomers to the community (which could imply, for example, working with real estate agents to identify newcomers to the community); new Canadians; recent retirees (who might also be

volunteers); new mothers and young families; etc. Also, in terms of targeted marketing, social media is increasingly effective over 'traditional' marketing avenues. As well, direct marketing to the target groups identified (over general broadcast methods) is preferred. Finally, any special events or activities that are likely to generate free (and positive) media publicity are advantageous. The development of a marketing plan incorporating these elements will be a key focus of the previously-recommended reinstated Marketing Coordinator position.

### **C) Policies and Procedures**

**Recommendation 8: Review all policies through a customer-focused lens:** As part of the 'Community Outreach' component of the new Strategic Plan, all policies should be reviewed from the perspective of the customer. This would entail a review of all policies from five perspectives: 1) How is the experience of the Library user affected, positively or negatively, by this policy? 2) Is the Library user aware of the policy and how it affects them? 3) What changes need to be considered (or just *made*) to the policy to improve the user experience? 4) Should any changes made be communicated to Library users, and if so, how? and 5) How will we measure any positive change (or is it even important to do so)?

**Recommendation 9: Conduct an audit comparing the SDG Library policies with the ones included in the Ontario Public Libraries Guidelines:** As a matter of good practice, all policies should be reviewed against the Guidelines. It is suggested that this be carried out simultaneously with the review of policies from the customer experience focus, discussed earlier.

**Recommendation 10: Prepare an online policy and procedure manual for all staff access. This should include an alert/sign off mechanism to ensure that all staff are up to date with policies and procedures:** Following the policy review process, discussed previously, all policies should be name easily available and accessible online for all staff. As well, some sign off mechanism to show that staff have read and agreed to (i.e., 'signed off upon') policies should be incorporated. As well, the general public should be able to access this policies and procedures resource, if appropriate.

**Recommendation 11: Review the overdue fines policy with a goal of reducing barriers to Library use:** Increasingly, library fines (which often only generate a very small proportion of overall revenues) are seen as a barrier to use, especially for lower-income and remote users. As a component of ensuring accessibility (a key strategic direction in the Library's new Strategic Plan) strong consideration should be given to elimination of overdue fines for all materials for adults.

## D) Networking and Communications

### **Recommendation 12: Increase the frequency of staff communications and networking events:**

A particularly difficult issue for a library system in a large geographical area with a number of small branches is the ability of staff to connect with one another and build a sense of togetherness and teamwork. Unlike a system with fewer and larger branches, where staff have more opportunity to interact informally on a day-to-day basis, for a smaller and more spread-out system, such opportunities for collegiality need to be intentionally created. While such opportunities do exist now, the feedback from staff through the consultation process was that they were not frequent enough for effective engagement. Accordingly, the recommendation here is to have more opportunities for staff interaction: for example, district meetings (by Zoom or equivalent) once a month and entire staff networking and learning sessions perhaps 3 to 4 times per year. At least one of these total staff events should be in person (obviously, as health regulations permit).

## E) Branches and Facilities

### **Recommendation 13: Review highest relative cost branches to determine ways to reduce costs:**

The analysis identified one group of 'highest cost' branches, where per user costs were significantly higher than the average trend seen in other branches. These five 'highest cost' branches - Winchester, Lancaster, Finch/Makerlab, Maxville and Williamstown – should be assessed with a view to identifying ways to either decrease costs, or increase utilization (within the existing cost envelope). It is recommended that a specific plan be developed for each of these branches (with target utilization) for improvement over a 4-year period (the period of the Strategic Plan) to identify barriers to success at the branches. If targets cannot be met, or if cost per user ratios dip further, it is recommended that closure of the Branch be considered. (It is noted in passing that Williamstown and Lancaster are only 7 km. distant from each other, so a refinement on this recommendation in this specific case would be to close one – likely Williamstown which has lower utilization – and keep the other or even expand it<sup>2</sup>).

### **Recommendation 14: Review lowest relative cost branches to determine ways to increase utilization:**

On the other hand, there is a group of high-performance branches where the utilization is somewhat higher than the per user cost trend would suggest. These branches could benefit from additional investment which could then see a payoff in terms of additional return. This group of five branches includes Long Sault, Iroquois, Avonmore, Chesterville, and South Mountain. These might be the logical focal points for new programs and services. As with the 'highest cost' branches, a four-year plan, co-incident with the term of the Strategic Plan, could be developed for each branch.

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<sup>2</sup> It is noted as well that in Summer of 2021 a plan for the expansion of the Lancaster Branch was developed by Raymond Labossiere Architects for an approximate doubling of the space. The cost of this (at the time, it would undoubtedly be higher now) was approximately \$830,000.

**Recommendation 15: Conduct facility review process:** At the end of the ‘trial period’ referenced above, and in reviewing the results of the specific plans and targets for the highest and lowest relative costs groups, the SDG Library should consider implementing over time, a facility review process, possibly to reduce the number of branches or increase the size of particularly well-used branches. It is suggested that this be phased in over a three-year period after the four-year period of the current Strategic Plan.

Municipality	Current Branches in Municipality	Possible Longer-Term Solution
North Dundas	<ul style="list-style-type: none"> <li>Winchester</li> <li>Chesterville</li> <li>South Mountain</li> </ul>	<ul style="list-style-type: none"> <li>retain South Mountain branch</li> <li>retain Chesterville branch</li> <li>consider closing Winchester branch</li> </ul>
South Dundas	<ul style="list-style-type: none"> <li>Iroquois</li> <li>Morrisburg</li> <li>Williamsburg</li> </ul>	<ul style="list-style-type: none"> <li>retain Iroquois branch</li> <li>consider closing either Williamsburg or Morrisburg</li> </ul>
North Stormont	<ul style="list-style-type: none"> <li>Crysler</li> <li>Avonmore</li> <li>Finch/MakerLab</li> </ul>	<ul style="list-style-type: none"> <li>retain Avonmore branch</li> <li>consider closing either Chrysler or Finch MakerLab</li> </ul>
South Stormont	<ul style="list-style-type: none"> <li>Ingleside</li> <li>Long Sault</li> <li>St. Andrews West Express Depot</li> </ul>	<ul style="list-style-type: none"> <li>retain Long Sault branch</li> <li>consider closing Ingleside or St. Andrews West Express West</li> </ul>
North Glengarry	<ul style="list-style-type: none"> <li>Maxville</li> <li>Alexandria</li> <li>Dalkeith Express Depot</li> </ul>	<ul style="list-style-type: none"> <li>retain Alexandria and Dalkeith branches</li> <li>consider closing Maxville branch</li> </ul>
South Glengarry	<ul style="list-style-type: none"> <li>Williamstown</li> <li>Lancaster</li> <li>Glen Water Express Depot</li> </ul>	<ul style="list-style-type: none"> <li>(likely) expand Lancaster and close Williamstown</li> </ul>

**Recommendation 16: Consider County acquisition of Library facilities:** After any rationalization of the system as a result of the previous recommendations, the SDG Library should encourage the County to acquire the properties that constitute the system at that point (where this is possible and makes sense, recognizing that several are in facilities that are shared with other uses). This will ensure a level of consistency with respect to the ongoing maintenance and care of the facilities.

**Recommendation 17: Consider alternative services in remote and rural locations:** The consultation process (especially the Stakeholder survey undertaken as part of the Library’s Strategic Plan) revealed that some in the Morewood area in North Dundas felt that a branch was needed in that location. While not recommending a new branch, it is possible that some form of service could be extended to that relatively unserved area – perhaps a holds locker, book kiosk or self-serve extended access. As well, there may be other areas in the United Counties where alternative service delivery could be considered. A mobile service or bookmobile may also be a possibility). And, if closure of any branches becomes a reality these could be a means of providing service to those locations as was done with Express Depots in some communities.

**Recommendation 18: Consider central or main branch:** Several comments in the staff and stakeholder surveys related to the desirability of having a larger ‘main’ or ‘central’ branch for the Library system. This is always difficult in a geographically spread-out system (such as SDG Library) but should be considered in any consolidation (or expansion) of Library branches that might occur as a result of the previous recommendations. The Library’s administrative office could be relocated there is a purpose-built facility more suited to a delivery system than the basement of the County’s Administrative Centre.

## **F) Technology**

**Recommendation 19: Develop a Multi-Year Technology Plan:** This plan should incorporate both the ‘internal’ and ‘external’ aspect of technology as previously discussed and incorporate the following components:

- Provide adequate staffing levels for administration, support, and backup of Library technology services.
- Provide additional training resources for staff and patrons.
- Investigate functional and financial benefits of moving the ILS from a locally hosted system to a cloud service.
- Include capital and operating costs of planned implementation in the Technology Plan.
- Investigate and implement open access resources for self-service and after-hours options.
- Review and install remote support tools for Library systems staff.
- Investigate Polaris ILS modules for operational efficiencies.
- Continue work with the County on access to a broadband solution.

## **G) Governance**

**Recommendation 20: Encourage Board Diversity:** The consultation process revealed some comments relating to the diversity and representativeness of the Board (not suggesting that there is any current problem or issue, but just that over time the Board should be aware of its own diversity and representativeness. Specific suggestions in this regard are that the Board should attempt to include: younger people; representatives of specific communities (e.g., LGBTQ+); newcomers to the community; etc.). This is a matter that should be considered in on-going Board recruitment.

## 4.2. Timing and Critical Path

Below is a suggested timeline for implementation of the recommendations. The highlighted cells indicate that action would take place on that recommendation in that year.

Recommendations that are black across the row' indicate that the recommendation would be on-going throughout that span of time. Note that this is a *suggested* timeline; it will very likely need to be adjusted as time goes by to take unforeseeable circumstances and new opportunities into account as they arise.

Recommendation	2023	2024	2025	2026	2027
Recommendation 1: Revise the current organizational structure					
Recommendation 2: Revise the Systems Librarian position into an Information Services Librarian position, reinstate the Systems Support Coordinator position					
Recommendation 3: Reinstate the Communications & Marketing Coordinator position					
Recommendation 4: Develop a specific Succession Plan					
Recommendation 5: Continually develop new programs and services					
Recommendation 6: Review hours of operation at all branches					
Recommendation 7: More active but targeted marketing program					
Recommendation 8: Review all policies through a customer-focused lens					
Recommendation 9: Do an audit comparing the SDG Library policies with the ones included in the Ontario Public Libraries Guidelines					
Recommendation 10: Prepare an online policy and procedure manual for all staff access					
Recommendation 11: Review the overdue fines policy with a goal of reducing barriers to Library use					
Recommendation 12: Increase the frequency of staff communications and networking events					
Recommendation 13: Review highest relative cost branches to determine ways to reduce costs					
Recommendation 14: Review lowest relative cost branches to determine ways to increase utilization					
Recommendation 15: Conduct facility review process					
Recommendation 16: Consider County acquisition of Library locations					
Recommendation 17: Consider alternative services in remote and rural locations					
Recommendation 18: Consider central or main branch					
Recommendation 19: Develop a Multi-Year Technology Plan					
Recommendation 20: Encourage Board Diversity					

### 4.3. High-Level Resource Requirements (Human and Financial)

The chart below outlines, at a high level the anticipated resource requirements for the implementation of these recommendations.

Recommendation	Human Resource Requirements	Financial Requirements
Recommendation 1: Streamline the current organizational structure	<ul style="list-style-type: none"> <li>minimal – some senior staff time to communicate new model to staff</li> </ul>	<ul style="list-style-type: none"> <li>assume done within existing staffing resources envelope</li> </ul>
Recommendation 2: Revise the Systems Librarian position into an Information Services Librarian position. Reinstatement the Systems Coordinator Position.	<ul style="list-style-type: none"> <li>small – some small amount of senior staff time to revise job descriptions</li> </ul>	
Recommendation 3: Reinstatement the Communications & Marketing Coordinator position		
Recommendation 4: Develop a specific Succession Plan	<ul style="list-style-type: none"> <li>will require some senior management and Board time (estimate 3-5 person-days of effort)</li> <li>some time on part of Board members to review, question and endorse plan</li> </ul>	<ul style="list-style-type: none"> <li>likely minimal, although some external professional expertise may be required to comment on succession plan (particularly if Board decides to go outside the organization)</li> </ul>
Recommendation 5: Continually develop new programs and services	<ul style="list-style-type: none"> <li>to be determined, but will be within existing staff time allocations</li> </ul>	<ul style="list-style-type: none"> <li>to be determined – presumably any additional costs will come out of already-established program budget, so no additional cost</li> </ul>
Recommendation 6: Review hours of operation at all branches	<ul style="list-style-type: none"> <li>moderate amount of staff time</li> </ul>	<ul style="list-style-type: none"> <li>none</li> </ul>
Recommendation 7: More active but targeted marketing program	<ul style="list-style-type: none"> <li>to be determined – will be within job description of Marketing and Communications Coordinator</li> </ul>	<ul style="list-style-type: none"> <li>likely a larger marketing budget will be required (1.5 to twice times present)</li> </ul>
Recommendation 8: Review all policies through a customer-focused lens	<ul style="list-style-type: none"> <li>estimated 2-3 days of senior staff time per year</li> </ul>	<ul style="list-style-type: none"> <li>minimal</li> </ul>
Recommendation 9: Do an audit comparing the SDG Library policies with the ones included in the Ontario Public Libraries Guidelines	<ul style="list-style-type: none"> <li>estimated 1-2 days of senior staff time, one time</li> </ul>	<ul style="list-style-type: none"> <li>minimal</li> </ul>
Recommendation 10: Prepare an online policy and procedure manual for all staff access	<ul style="list-style-type: none"> <li>moderate</li> </ul>	<ul style="list-style-type: none"> <li>to be determined (whether done in-house or through external provider)</li> </ul>
Recommendation 11: Review the overdue fines policy with a goal of reducing barriers to Library use	<ul style="list-style-type: none"> <li>moderate</li> </ul>	<ul style="list-style-type: none"> <li>small (cost = foregone revenue)</li> </ul>

<b>Recommendation</b>	<b>Human Resource Requirements</b>	<b>Financial Requirements</b>
Recommendation 12: Increase the frequency of staff communications and networking events	<ul style="list-style-type: none"> <li>significant staff-time requirement: maybe 3-5 person days per staff person, per year</li> </ul>	<ul style="list-style-type: none"> <li>no incremental cost unless additional staff hired to replace regular staff during absence</li> </ul>
Recommendation 13: Review highest relative cost branches to determine ways to reduce costs	<ul style="list-style-type: none"> <li>moderate amount of staff time to review</li> </ul>	<ul style="list-style-type: none"> <li>minimal</li> </ul>
Recommendation 14: Review lowest relative cost branches to determine ways to increase utilization	<ul style="list-style-type: none"> <li>moderate amount of staff time to review</li> </ul>	<ul style="list-style-type: none"> <li>minimal</li> </ul>
Recommendation 15: Conduct facility review process	<ul style="list-style-type: none"> <li>moderate amount of staff time to review</li> </ul>	<ul style="list-style-type: none"> <li>minimal</li> </ul>
Recommendation 16: Consider County acquisition of Library locations	<ul style="list-style-type: none"> <li>to be determined</li> </ul>	<ul style="list-style-type: none"> <li>to be determined</li> </ul>
Recommendation 17: Consider alternative services in remote and rural locations	<ul style="list-style-type: none"> <li>to be determined</li> </ul>	<ul style="list-style-type: none"> <li>could be significant depending upon technology: up to \$30K - \$50K per location</li> </ul>
Recommendation 18: Consider central or main branch	<ul style="list-style-type: none"> <li>to be determined</li> </ul>	<ul style="list-style-type: none"> <li>to be determined</li> </ul>
Recommendation 19: Develop a Multi-Year Technology Plan	<ul style="list-style-type: none"> <li>moderate staff time at all levels</li> </ul>	<ul style="list-style-type: none"> <li>to be determined – will be dependent upon plan developed</li> <li>possibly external expertise will be required</li> </ul>
Recommendation 20: Encourage Board Diversity	<ul style="list-style-type: none"> <li>small</li> </ul>	<ul style="list-style-type: none"> <li>none to minimal</li> </ul>



#### 4.4. Suggested Targets and Outcomes

The chart below outlines suggested targets and outcomes associated with each of the recommendations as outlined earlier to measure and demonstrate progress. As with the timing considerations, these are *suggested* outcomes for discussion with the Board and staff of SDG Library.

Recommendation	Milestones, Targets, Outcomes
Recommendation 1: Streamline the current organizational structure	New structure in place by end 2023
Recommendation 2: Revise the Systems Librarian position into an Information Services Librarian position. Reinstate the Systems Support Coordinator position	New positions in place by end 2023. (Hire Librarian first, who can then participate in hiring Systems Support Coordinator – might take into 2024 for full complement.)
Recommendation 3: Reinstate the Communications & Marketing Coordinator position	Begin recruitment in 2023; have new position in place by end 2023
Recommendation 4: Develop a specific Succession Plan	Have plan articulated and approved by Board in 2023
Recommendation 5: Continually develop new programs and services	Aim for 1 new (innovative) program or service in place in each district, each year (at one branch)
Recommendation 6: Review hours of operation at all branches	Have review complete and any changes in place by end 2024
Recommendation 7: More active but targeted marketing program	Revise marketing efforts in 2024 (once Coordinator position filled) and implement on on-going basis
Recommendation 8: Review all policies through a customer-focused lens	Set target to revise/refine all policies over a three year period; aim for 1/3 of policies reviewed each year over 2023, 2024, 2025
Recommendation 9: Do an audit comparing the SDG Library policies with the ones included in the Ontario Public Libraries Guidelines	Undertake overall review in 2023 to set context for review of all policies. Then review policies simultaneously with review of customer service review (Recommendation #8)
Recommendation 10: Prepare an online policy and procedure manual for all staff access	Have in place and all staff 'signed off' by end 2024
Recommendation 11: Review the overdue fines policy with a goal of reducing barriers to Library use	Review and make decision by end 2023
Recommendation 12: Increase the frequency of staff communications and networking events	Implement accelerated communications and networking schedule by early 2023 and continue throughout period
Recommendation 13: Review highest relative cost branches to determine ways to reduce costs	Have plans for each affected branch in place by end 2024 and implement over next 2 years
Recommendation 14: Review lowest relative cost branches to determine ways to increase utilization	As with Recommendation #12
Recommendation 15: Conduct facility review process	Begin assessment in 2027
Recommendation 16: Consider County acquisition of Library locations	Undertake assessments and begin negotiations in 2027
Recommendation 17: Consider alternative services in remote and rural locations	Identify potential locations and have remote service plan in place by end 2024; begin implementation as appropriate in 2025
Recommendation 18: Consider central or main branch	Consider in concert with Recommendation #14; Board to have made firm decision on this by 2027
Recommendation 19: Develop a Multi-Year Technology Plan	Develop plan and begin implementation in 2023

Recommendation	Milestones, Targets, Outcomes
Recommendation 20: Encourage Board Diversity	Have plan in place to potentially increase diversity by 2026 (next Board, following next municipal election) – meantime avail of diversification opportunities as they arise

**4.5 Conclusion**

The SDG Library system is clearly a strong and well-loved institution throughout the United Counties. Its central position as a community resource and activity hub has been validated and reinforced through its recent strategic planning process. It is, however, weak on some key service indicators when compared to similar sized library systems (e.g., visits per capita, program attendance, circulation). In large part this is caused by the fact that the system is characterized by many small branches in rural locations and exacerbated by lower resourcing (funding and staff) than seen in other comparable library operations.

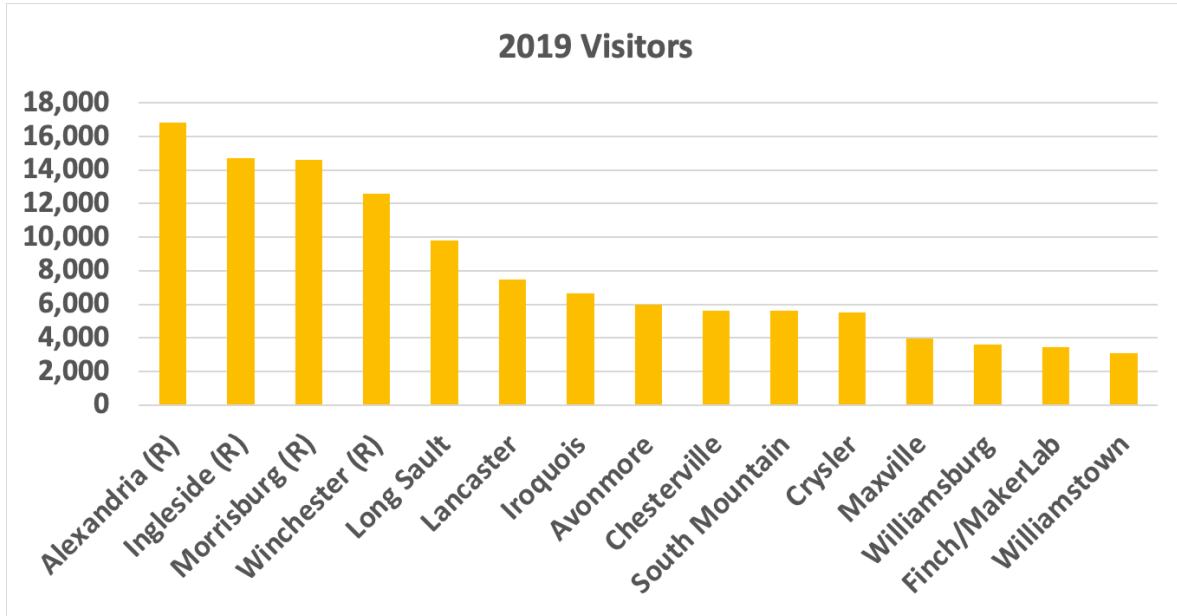
Moreover, the SDG Library system is on the cusp of change. Staff turnover at the senior levels within the next few years is a virtual certainty. Key functional positions remain unfilled.

This Service Review and its recommendations are designed to address this situation. A tightening of the organizational structure; the development of a succession plan; filling key positions; a hard look at the efficiency of the branches and development of plans to improve this; and an eventual decision to close some branches and possibly expand others (with possibly the development of a central administrative branch) are key elements of a plan to ensure that the system continues to be a relevant and meaningful resource to the community, and can achieve even greater success in the future.

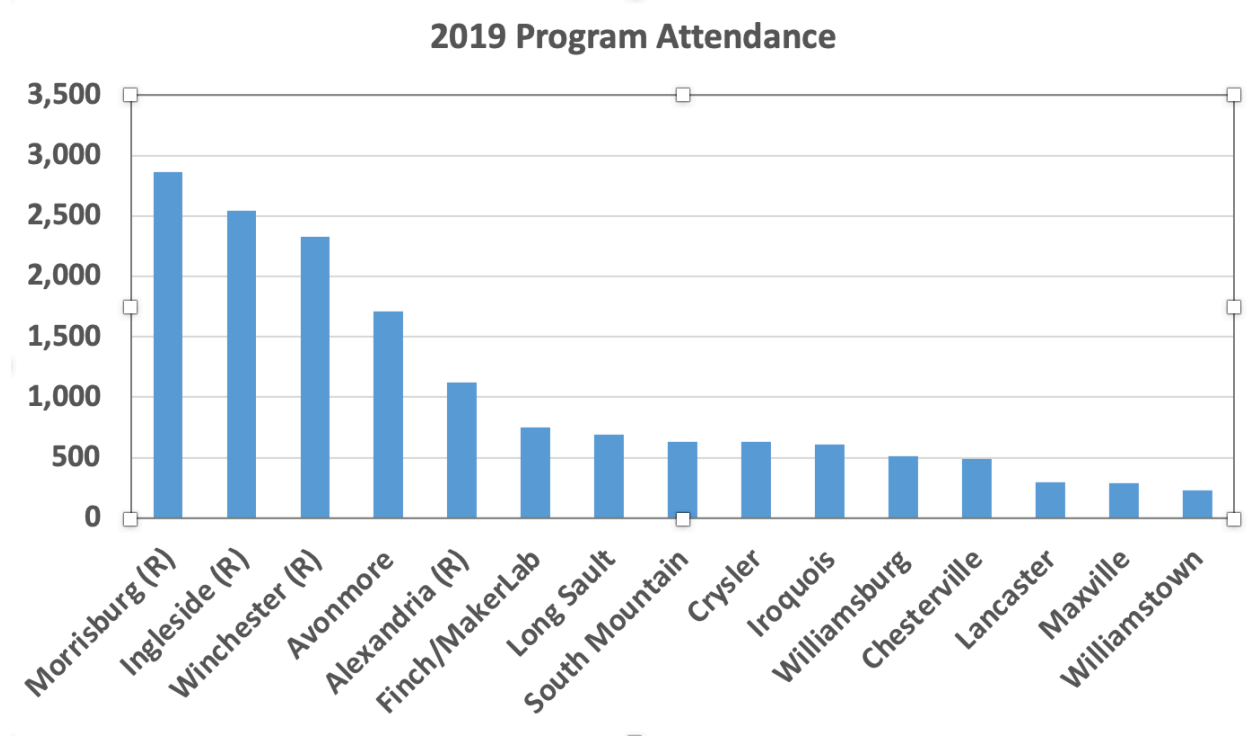
## Appendix A: Profile of the Branches

### Basic Data

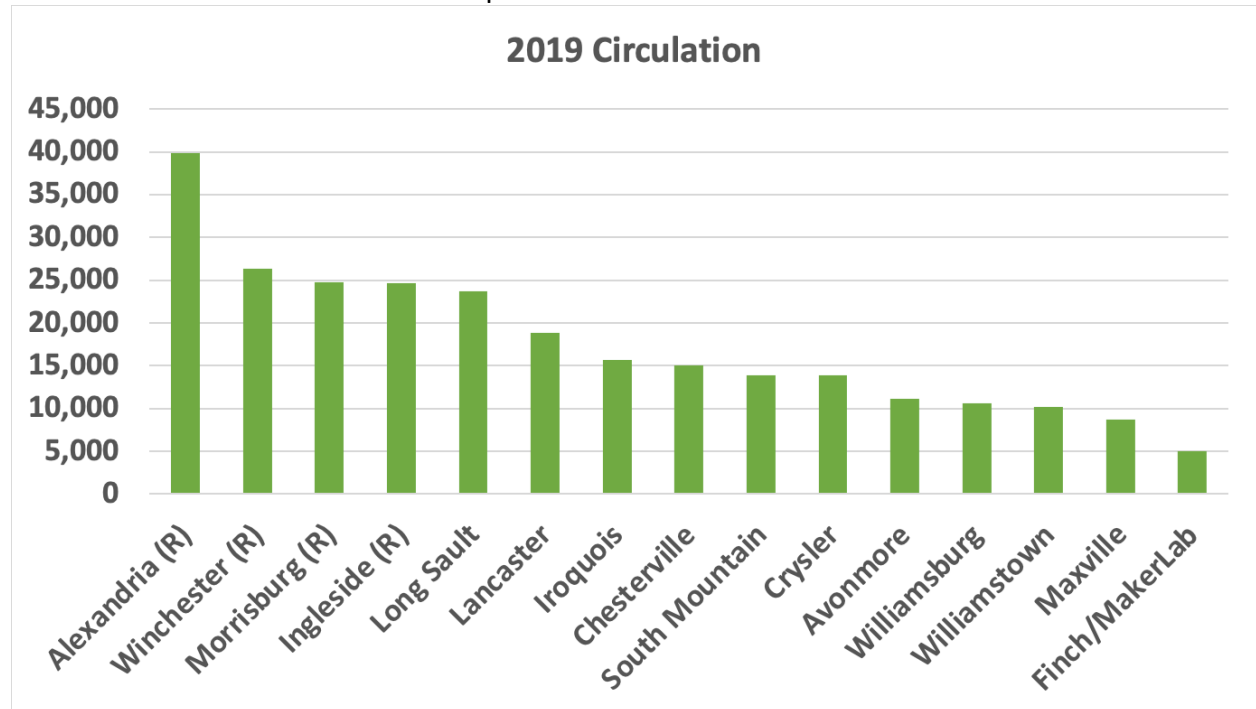
The following charts show some basic parameters of the 15 branches in the SDG Library system. Data from 2019 (the last 'normal' year of operations of the Library) is used for comparison purposes, with the exception of the budget, which is current (2022).



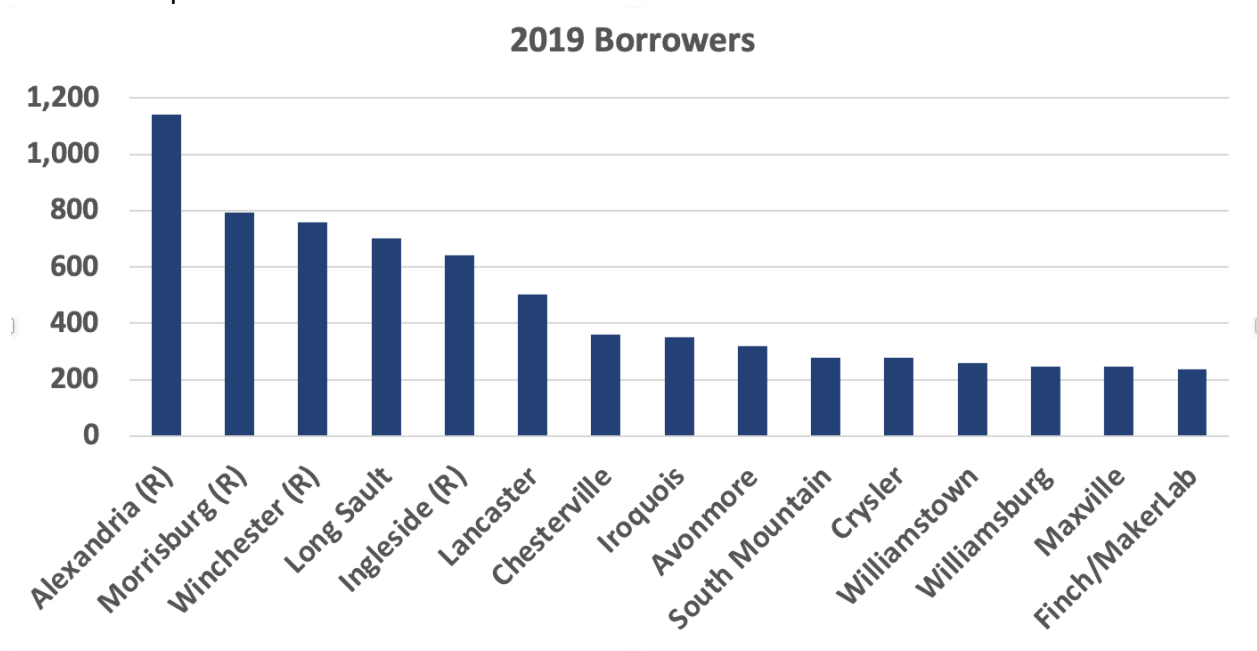
To a large extent, program attendance at the branches follows this same pattern:



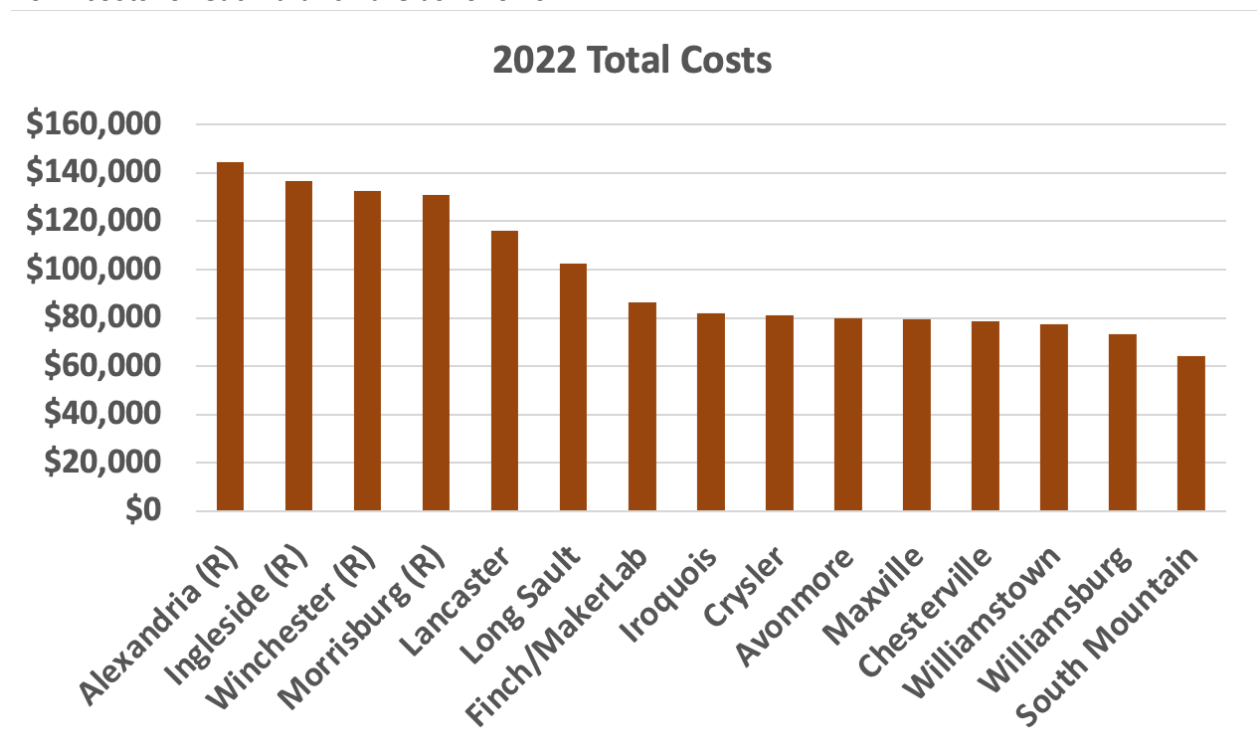
Circulation as well mirrors this basic pattern:



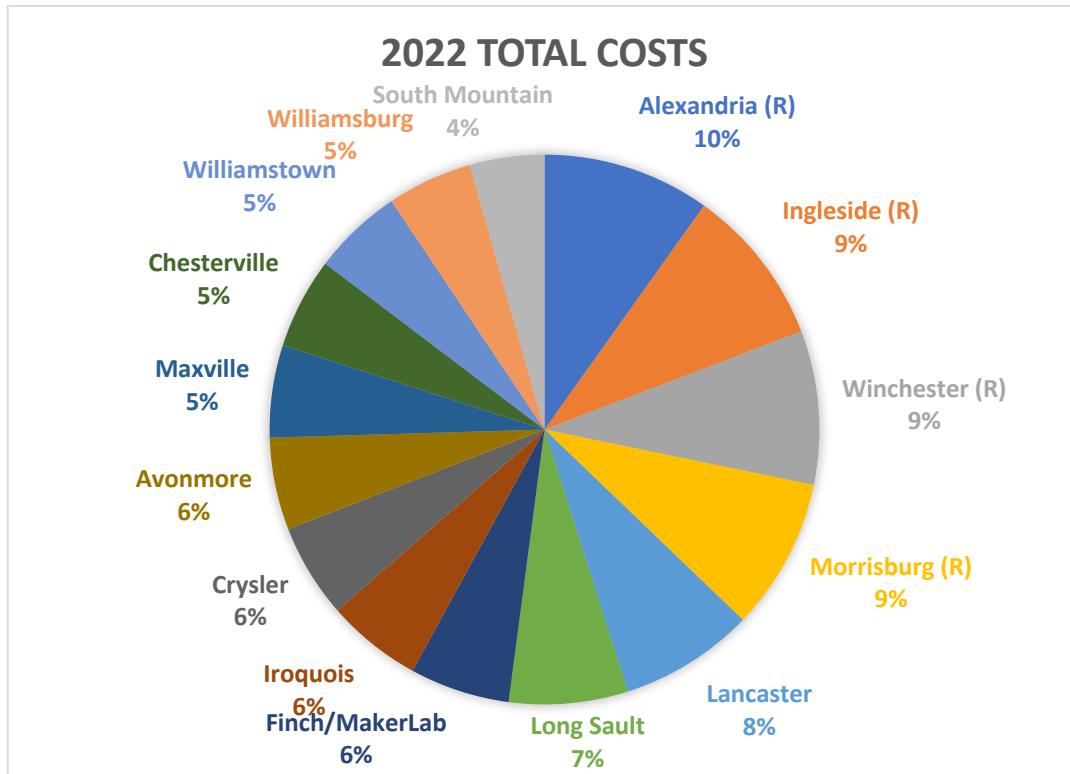
As does the pattern of borrowers:



2022 costs for each branch are as follows:



Another representation of costs is:



### Analysis of Individual Branch Utilization and Cost

An analysis of the costs of each branch relative to the utilization (as measured by visitors) is shown in the graph below. (Note that because 2019 was the last full ‘normal’ year prior to the pandemic, the 2019 figures for visitation are used, whereas the 2022 budget figures – the most recent available - are used. Thus the results discussed here should be considered indicative and not necessarily exact. Nonetheless, in our view they provide a representative view of the likely current relative performance of each branch.)

The chart plots the cost of each branch against its utilization, as measured in terms of visitors (in 2019). A upwards-sloping trend line shows the general relationship of cost to utilization, which makes general sense – the higher the utilization, the greater the cost. Branches that are significantly above (higher) than the trend line are those that have a higher cost than what might be expected relative to their utilization; those significantly below the line are ones that appear to be most ‘efficient’ – having greater than expected utilization relative to their cost.

Based on this analysis, two clusters of branches can be identified. The first is those branches above the line, where costs relative to utilization are comparatively high, and where measures to reduce costs or, conversely, increase utilization, might be considered. A second group of high-performing efficient branches are those falling under the trend line (see page 71); these

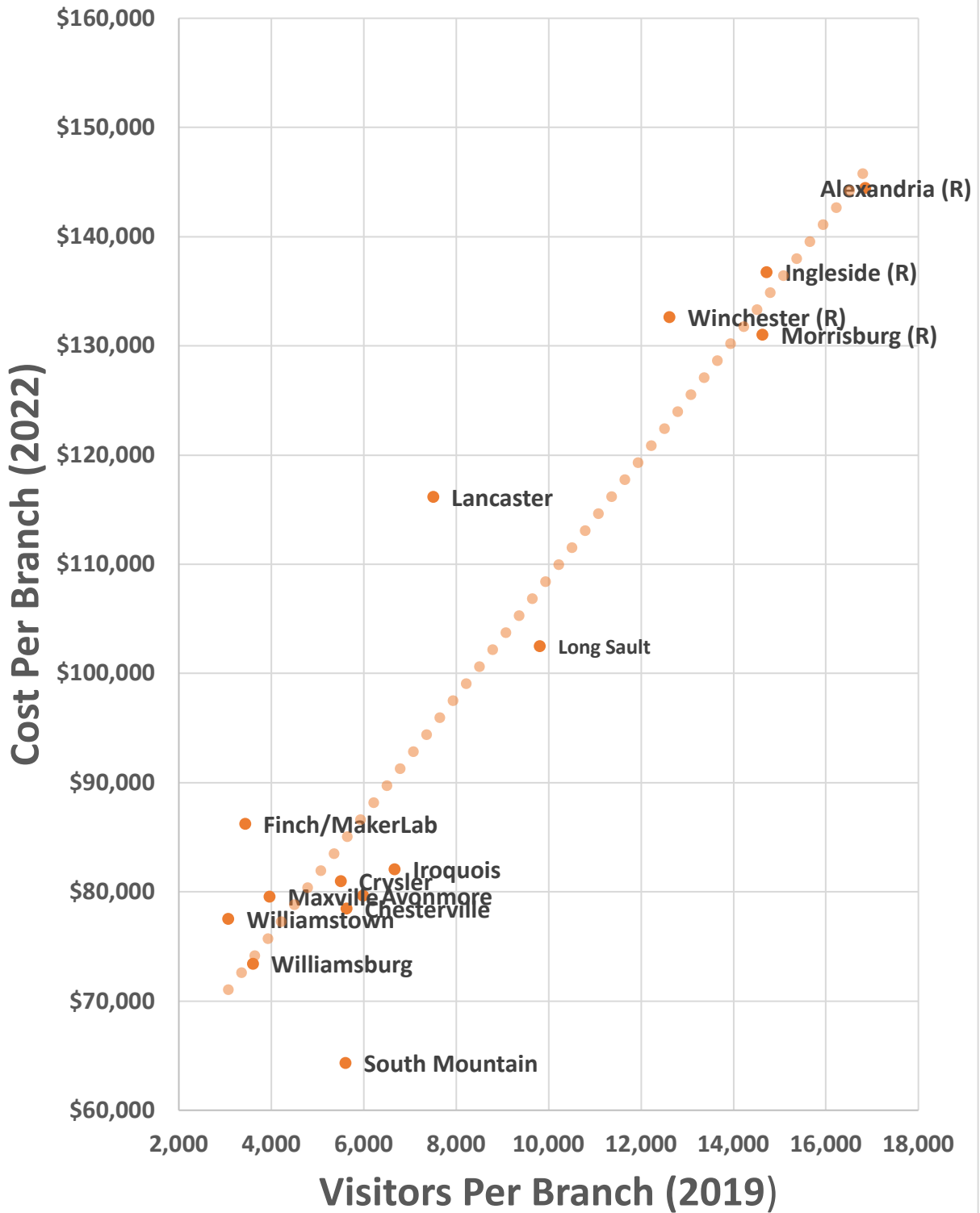
are ones where possibly even greater utilization would result from increase budget expenditure.

The branches in both these groups are:

<b>Group</b>	<b>Branches</b>	<b>Implied Service Area Action</b>
"Above the Line" – high cost relative to utilization	<ul style="list-style-type: none"> <li>• Winchester</li> <li>• Lancaster</li> <li>• Finch/MakerLab</li> <li>• Maxville</li> <li>• Williamstown</li> </ul>	<ul style="list-style-type: none"> <li>• examine ways to reduce costs and/or increase utilization</li> </ul>
"Below the Line" – low cost relative to utilization	<ul style="list-style-type: none"> <li>• Long Sault</li> <li>• Iroquois</li> <li>• Avonmore</li> <li>• Chesterville</li> <li>• South Mountain</li> </ul>	<ul style="list-style-type: none"> <li>• examine whether increased budget in these branches could enhance utilization even further</li> </ul>

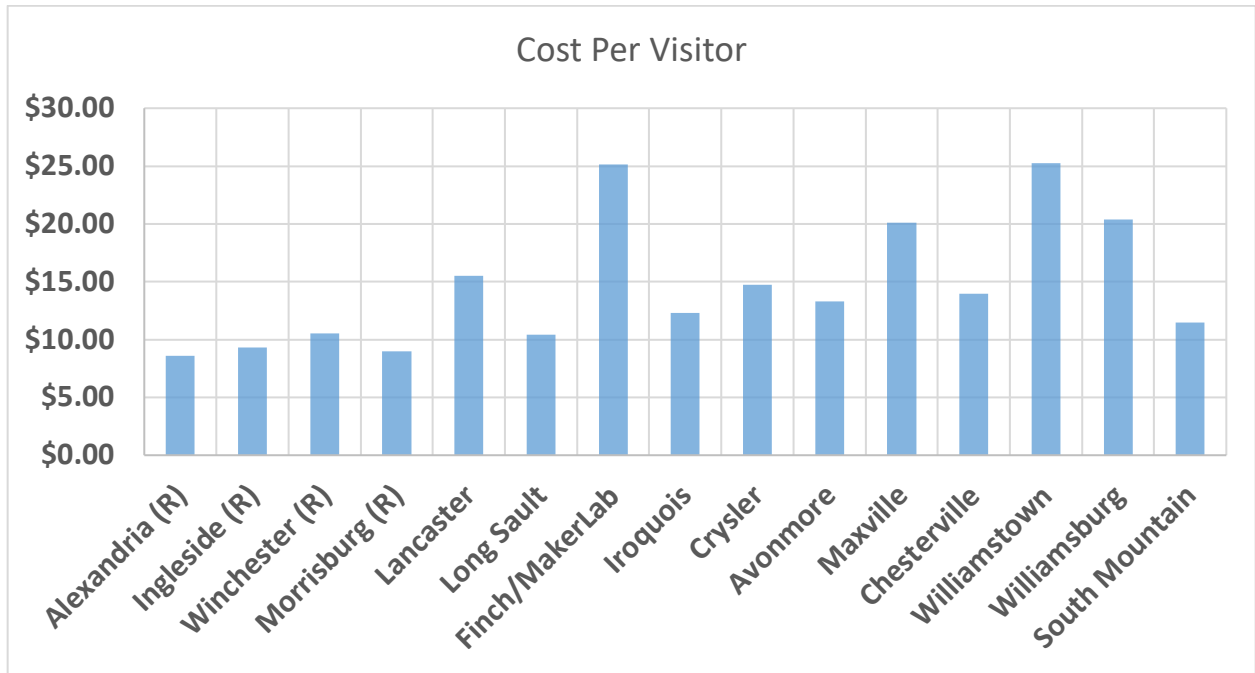
Note that none of the branches in the SDG Library system appear to be so far off the line that significant remedial action is warranted (e.g. closure of a branch).

# Cost vs. Visitors, All Branches

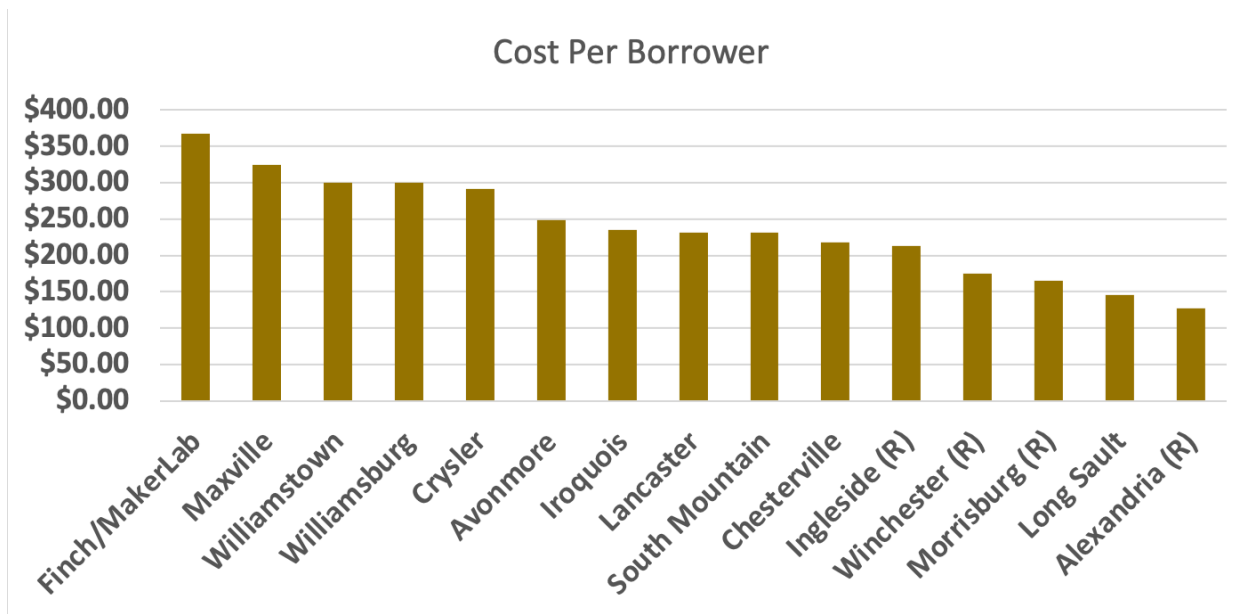




Another perspective on use is afforded by looking at the cost per visit....



... and the cost per borrower:



This analysis shows the Finch/Maker Lab, the Maxville Branch, the Williamsburg Branch, and the Williamstown Branch to all be in the highest cost categories in terms of both costs per user as well as cost per item borrowed. Lancaster were in the highest cost per user category, but had a more reasonable cost per borrowed item.

## Appendix B: 2022 – 2026 Strategic Plan Summary

**Mission:** To connect communities through innovative services, literacy resources, independent learning, creative expression, leisure, and civic engagement.

**Vision:** To be “the Place” in SDG for learners, seekers, and explorers.

### Values:

**Accessible:** We strive to continually identify and reduce barriers to service and be responsive to the diverse needs of residents of all ages, backgrounds, abilities, sexual orientations, gender identities, or levels of socioeconomic status.

**Equitable:** We seek to provide an inclusive, non-judgmental environment in which everyone in the community feels safe, welcome, and comfortable, by focusing on building trusting, supportive connections.

**Open:** We commit to being honest and authentic in all our interactions, listening intently and supporting the development of genuine connections.

**Strategic Directions:** The Plan has a four year timeline with three fundamental strategic directions. These are listed below, along with more specific strategic actions and success indicators.

Strategic Direction	Specific Strategies	Indicators of Success
<b>1. Physical and Digital Infrastructure</b>	<ul style="list-style-type: none"> <li>• invest in the growing digital collection</li> <li>• ensure print collection keeps pace</li> <li>• each branch should strive to become a community hub</li> <li>• undertake facility improvements (including creation of central administrative branch)</li> <li>• ensure accessibility throughout branches</li> </ul>	<ul style="list-style-type: none"> <li>• develop clear communications strategy</li> <li>• increase in active members</li> <li>• asset management plan developed</li> </ul>
<b>2. Community Outreach</b>	<ul style="list-style-type: none"> <li>• develop messaging that showcases Library’s role as community and knowledge hub</li> <li>• more outreach and related communications activities</li> <li>• explore innovative means of community engagement</li> </ul>	<ul style="list-style-type: none"> <li>• growing rate of new membership development</li> <li>• increased partnerships in community</li> </ul>
<b>3. Organizational Strength</b>	<ul style="list-style-type: none"> <li>• undertake organizational review (i.e., this service review)</li> <li>• ensure SDG Library continues to be seen as a great place to work</li> <li>• gather regular feedback from staff</li> </ul>	<ul style="list-style-type: none"> <li>• all key staff positions are filled</li> <li>• communications and marketing priorities established</li> <li>• opportunities for professional development have been accessed by staff</li> </ul>

	<ul style="list-style-type: none"><li>• ensure professional development opportunities in place for staff</li><li>• ensure succession plan in place</li></ul>	<ul style="list-style-type: none"><li>• quarterly staff 'pulse surveys' undertaken</li><li>• succession plan for senior management in place</li></ul>
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**STAFF REPORT****S.R. No. 11-2024**

<b><u>PREPARED BY:</u></b>	Rebecca Luck – Director of Library Services
<b><u>PREPARED FOR:</u></b>	SDG Library Board
<b><u>LIBRARY BOARD DATE:</u></b>	May 23, 2024
<b><u>SUBJECT:</u></b>	2024 SDG Reads

**BACKGROUND:**

1. SDG Reads is a “One Book, One Community” program that encourages all residents across SDG to read the same title before coming together for an evening with the author. SDG Reads selects Canadian authors to highlight the diverse talent of our country, while building a sense of community through the shared experience of reading.
2. The 2024 SDG Reads event will feature author Craig Shreve and his novel entitled “The African Samurai”, which is based on the true-life story of Yasuke, history’s first foreign born samurai, and the only samurai to ever be of African descent. Mr. Shreve was born and raised in North Buxton, Ontario, and studied Computer Science at the University of Guelph. After graduating, he was involved in humanitarian efforts, helping to build homes in Honduras, Kenya, Guatemala, Paraguay, Nicaragua, Chile, El Salvador and Bolivia all while continuing to write.
3. Residents of SDG will be invited to attend the event at North Stormont Place on Monday, October 7, 2024. A special VIP experience will be held for those wishing to have one-on-one time with the author. The main event will follow, in which Mr. Shreve will speak about his book, answer questions from the audience and provide a book-signing opportunity. The event will culminate with a silent auction, with proceeds going to SDG Reads.
4. In anticipation for the launch of the 2024 SDG Reads, the Communications and Marketing Coordinator prepared a series of clues that were posted online (through social media) and within branches. Patrons were encouraged to guess the author’s name by completing a ballot. All correct guesses were entered into a draw to win a free copy of the featured title.

**ANALYSIS:**

5. To compliment our existing collection, we have added the following to our physical and digital collection:
  - 6 circulating copies of The African Samurai;
  - 1 book club kit (comprised of 12 copies);
  - 3 copies of Craig Shreve’s first book, One Night in Mississippi;
  - 1 eAudiobook copy of the African Samurai and One Night in Mississippi;
  - 1 non-fiction copy of African Samurai: The True Story of Yasuke, a Legendary Black Warrior in Feudal Japan (by Thomas Lockley) and 1 copy of Shōgun (by James Clavell).



6. Lastly, books will now be available for purchase in branches, which will serve as a fundraiser for the event.

**IMPACT ON 2024 BUDGET:**

7. N/A

**ALIGNMENT WITH STRATEGIC PLAN:**

Goal 2: Conduct Community Outreach

**STAFF REPORT**

**S.R. No. 12-2024**

**PREPARED BY:** Rebecca Luck – Director of Library Services

**PREPARED FOR:** SDG Library Board

**LIBRARY BOARD DATE:** May 23, 2024

**SUBJECT:** Chesterville Library Branch

**BACKGROUND:**

1. The existing Chesterville Library branch is located at 1 Mill Street, Chesterville, ON. The branch has an internal square footage of 1123 ft<sup>2</sup>. However, the bathrooms do not meet AODA compliance, nor can they be renovated to meet standard requirements.
2. On March 27, 2024, SDG Library staff (Director of Library Services and District 1 Supervisor) met with the Municipality of North Dundas (Meaghan Meerburg, Director of Recreation and Culture) to discuss an alternative location for the Chesterville Library Branch, proposed at 1 William Street, Chesterville, ON. The proposed location is adjacent to St. Mary Catholic School, Chesterville Pool, Chesterville Park and the Nelson LaPrade Centre.



3. On May 8, 2024, SDG Library staff (Director of Library Services) subsequently met with the Municipality of North Dundas (Meaghan Meerburg, Director of Recreation and Culture and Preston Stronach, Chief Building Official) to further discuss the proposed alternate location for the Chesterville Library Branch.

**ANALYSIS:**

4. The proposed location consists of an interior envelope of approximately 800 ft<sup>2</sup>.
5. In accordance with ARUPLO guidelines, small rural libraries should consist of a minimum square footage of 2500 ft<sup>2</sup>.
6. Although the proposed location does not meet current guidelines, the Municipality would be agreeable to bring forward to Council the possibility of entering into a partnership between the SDG Library and Chesterville's Nelson LaPrade Centre. The Nelson LaPrade Centre is adjacent to the proposed site, has a capacity of 200 people, and is equipped with a kitchen area. It was proposed that the Nelson LaPrade Centre could potentially be used by Library staff for programs and events (with the understanding that the facility be used for Library programming only while not in use).
7. Furthermore, the possibility of expanding the proposed location (as a 5-year plan) was also discussed as a future possibility.
8. Prior to moving into the proposed facility, renovations would need to be completed, most notably: converting the existing washroom into an accessible washroom, opening the interior envelope by removing interior walls, new carpeting, new lighting, and ensuring the site is properly climatized.
9. A follow up site visit between the Municipality of North Dundas, SDG Library and a general contractor will be scheduled in the near future to determine if this poses a financially viable option.

**IMPACT ON 2024 BUDGET:**

10. Should the Chesterville Library branch be relocated to the proposed location at 1 William Street, there will be an annual savings of approximately \$3,200 (before HST, and not adjusted for CPI).

**ALIGNMENT WITH STRATEGIC PLAN:**

Goal 1: Growing our Physical and Digital Infrastructure

March 22, 2023

**Township of Zorra Council**

**VIA EMAIL** [kmartin@zorra.ca](mailto:kmartin@zorra.ca)

**Re: Collaboration for Multi-Service Co-Builds**

At the Library Board meeting on March 21, 2023, the following resolution was passed:

Moved by: Brian Petrie

Seconded by: Cynthia Lacroix

“THAT Oxford County Library Board supports Zorra Township Resolution No. 16-03-2023 directing staff to collaborate regarding the exploration of multi-service co-builds.”

Sincerely,

Lisa Marie Williams  
CEO/Chief Librarian  
Oxford County Library

Cc: Oxford County Council







**STAFF REPORT**

**S.R. No. 12-2024**

**PREPARED BY:** Rebecca Luck – Director of Library Services  
**PREPARED FOR:** SDG Library Board  
**LIBRARY BOARD DATE:** May 23, 2024  
**SUBJECT:** Performance Evaluation of Director of Library Services

**BACKGROUND:**

1. In accordance with Policy number 2016-01 *Performance Review Policy for the Evaluation of the Director of Library Services*, a performance review of the Director of Library Services shall be completed each year by the end of June by a performance review committee.
2. This committee shall be comprised of at least two Library Board members, ideally one of whom has previously served in this role.
3. Policy number 2016-01 sets forth the procedure and expectations of the committee members.

**ANALYSIS:**

4. This report serves to seek out at least two (2) Board members who would like to serve on the performance review committee.

**IMPACT ON 2024 BUDGET:**

5. N/A

**ALIGNMENT WITH STRATEGIC PLAN:**

Goal 3: Strengthen our Organization