



Town of Newmarket

Agenda

Joint Council and Library Board Workshop

Tuesday, January 30, 2018 at 6:00 PM
Council Chambers

Notice

In accordance with the Town's Procedure By-law, no decisions are to be made but rather this meeting is an opportunity for Council to have informal discussion regarding various matters.

Declarations of Pecuniary Interest

Items

1. **The Commissioner of Community Services and Chief Executive Officer of the Library Board will provide opening remarks and a presentation (to be distributed at the meeting).**
2. **Newmarket Public Library Organizational Effectiveness and Efficiency Review**
Community Services - Commissioner / Newmarket Public Library – CEO
Joint Report #2018-01
January 21, 2018

Closed Session

3. **Newmarket Public Library Organizational Effectiveness and Efficiency Review (Closed Report)**

[Labour relations or employee negotiations as per Section 239 (2) (d) of the Municipal Act, 2001.]

Adjournment



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January 21, 2018

**COMMUNITY SERVICES – Commissioner
NEWMARKET PUBLIC LIBRARY - CEO
JOINT REPORT # 2018 - 01**

TO: Mayor Van Bynen
Members of Council

CC: Newmarket Public Library Board

SUBJECT: Newmarket Public Library Organizational Effectiveness and Efficiency Review

ORIGIN: Commissioner, Community Services
CEO, Newmarket Public Library

SUMMARY

Purpose

The purpose of this report is to help frame discussions for the joint Town Council and Newmarket Public Library Board workshop. This report outlines the project overview and finding summaries. There is also a portion of the workshop that will discuss items that qualify for closed session as per closed session parameters outlined in the Municipal Act.

Budget Impact

Any budget implications associated with advancing any recommendations will be coordinated through current budget approvals and future budget considerations aligned with the annual budget review and approval processes.

Summary

The discussion at this workshop will assist Town and library senior staff in order to help inform future recommendations (as necessary) and work plans in keeping with delegated authority (as appropriate) specific to the implementation of the recommendations outlined in the open and closed workshop reports.

BACKGROUND

Over the past number of years various processes and discussions have occurred focused on ensuring efficient and effective synergies and process alignment between the Town of Newmarket and the Newmarket Public Library. This consideration has involved a task force approach and past Newmarket Public Library boards have also been very active in this regard. These efforts resulted in minor incremental change; however, it was determined about a year ago by the CAO, CEO of the Library and the Commissioner of Community Services that it be best to dive deeper in an effort to examine where continuous improvement can be actualized between the two organizations. To this end, it was determined that a review sponsored by senior staff from the Town and Library and coordinated using a consultant that specialized in library operations and organizational effectiveness be initiated.

The staff expectation of this process was for resulting tangible recommendations and a path for implementation. The consultant engaged for this assignment was Pesce and Associates. They are a multi-faceted human resources consulting firm that has worked a lot with the library sector and is well respected in the industry.

COMMENTS

- PROJECT MISSION:** To partner with Newmarket Public Library and the Town in conducting an organizational review of specific operational functions and determine the most efficient and cost effective means for delivering services and achieving positive results.
- PROJECT SUCCESS:** Full assessment of organizational structure, decision making structure, work flow alignment and departmental operations.
- Recommendations to assist the Town and Library in becoming operationally effective and efficient, and customer-focused with organizational capacity aligned to strategic priorities.
- A roadmap for change including implementation plans for immediate, short, medium and long-term targets.
- PROJECT PLAN:** The project plan consisted of the following phases: 1. Project Launch and Discovery; 2. Current State Assessment; 3. Future State Development; 4. Final Report and Implementation Plan Development; 5. Project Closeout and Knowledge Transfer.

ANALYSIS: Overview of 25 documents related to the two organizations current and future directions and operations

24+ interviews with staff from the Library and various Town staff/departments/commissions.

Consultant knowledge and experience in organizational effectiveness and best practices.

The high level themes from the current state assessment are as follows:

1. **Structure:** The Library structure is highly resourced for back office functions in comparison to other public libraries of similar size providing similar services.
2. **Culture:** The Library culture is historically based on being a separate entity from the Town and staff places a high value on their independence.
3. **Workflow Processes:** The Town and Library have separate and distinct workflow processes and no updated formal service level agreements.
4. **Communication:** There is a lack of understanding and communication between the Town and Library regarding support function roles and what each organization is doing.
5. **Readiness for Change:** The Leadership at the Town and Library are eager to embrace new ways of working together for the benefit of both organizations.

RECOMMENDATIONS SECTION 1: MARKETING

Summary: There is room and opportunity for greater synergy between the Town and Library to promote library services and programs. Communications and marketing should be more closely aligned between the Town and Library to promote programs and events.

Areas where synergies and offerings could be improved between Library and the Recreation and Culture Department and Corporate Communications Department to create a seamless experience for the customer are contained within the following recommendations:

- Align Library branding with Town branding (logo, website, etc).
- Enhance Library's social media presence by leveraging the Town's social media platforms while recognizing social media will be a shared responsibility between the Town and Library.
- Develop and implement Media Relations policy that aligns to the Town's policy.
- Integrate Library programs and services into the appropriate sections of the Activity Guide (e.g. children's March Break camps) rather than as a standalone section.
- Develop a Service Level Agreement between the Library and Corporate Communications covering but not limited to: Library included in annual needs assessment by the Director, Corporate Communications.

RECOMMENDATIONS SECTION 2: FINANCE

Summary: Reduction of process duplication and Library utilization of Town technology and services will reduce resource requirements and maximize customer service.

The Town's Director, Financial Services and the Library CEO (or designates) establish a Service Level Agreement clearly define roles and responsibilities in these key areas to streamline, eliminate and increase efficiencies between the Library and Town. Specifically:

Accounts Receivable:

- Transition the Library to new system replacing the Town Class system.
- Conduct a cost/benefit analysis to explore setting up Library patrons on the Town registration payment system to allow one point of contact to make payments for library programs and fines with Town Customer Service Representatives.
- Transition to eventually have Library administrative staff manage cash.

Accounts Payable:

- Streamline approval process for invoices and Visa statements – reduce duplication.

Budget and Financial Statements:

- Where possible, move away from excel spreadsheets and leverage Town software that has similar capabilities for reporting and survey completion.

Payroll and Scheduling:

- Implement time and attendance system to improve efficiency in documenting hours and employee attendance.
- Assess opportunity for centralized scheduling/scheduler at the Library.

RECOMMENDATIONS SECTION 3: HUMAN RESOURCES

Summary: There is opportunity for the Town HR Department and the Library to partner together to create HR programs and services currently not available to the Library staff.

- Conduct a needs assessment to determine key HR programs/services required by the Library and timeframe for implementation e.g. performance management, succession planning, pay equity, training, etc.
- Review all Library HR policies, offer letters and conduct an HR audit by Town HR Department to ensure legal compliance, consistency with town policies and offer letter templates etc.
- Implement compliance training schedule – e.g. workplace violence (annually).
- Implement leadership training in performance management and managing in a unionized environment to build management knowledge and capability to handle complaints, grievances, employee relation issues, etc.
- Town Corporate HR initiatives should always include the Library as part of the corporate HR budget without assessing Library's financial capacity to participate.

RECOMMENDATIONS SECTION 4: INFORMATION TECHNOLOGY

Summary: Collaboration between the Library and the Town Information Technology Department can lead to better system integration and support resulting in improved customer service experience for the end user and overall better technology.

- Integrate Library onto Town internet network with security wall for Library to continue with full access to Internet for patrons.
- Library integrated into the Town emergency disaster plan back-up that is housed at Town Op Centre.
- Streamline processes to allow for seamless integration with current systems between the Town and Library e.g. JD Edwards, Outlook and the intranet.
- Establish service level agreements between the Town and Library. As part of this process discuss key areas for partnership: covering current and future technology planning; maintenance of hardware and software; data analytics and reporting to prevent duplication of effort; helpdesk support; employee training to enhance skill sets e.g. cyber security; how each area can leverage and support each other from a technology perspective e.g. Town has a back bone fiber ring system that Library could access, Library has expertise in unique software that could benefit the Town.

RECOMMENDATIONS SECTION 5: FACILITIES AND MAINTENANCE

Summary: There is an opportunity for the Town and Library to partner together to enhance the current janitorial contract and develop a proactive approach to maintain the interior and exterior of the building that houses the Library.

- Clarify roles and responsibilities for preventative and regular maintenance of the Library between the Town and Library.
- Establish service agreement with PWS Facilities and the Library: covering building condition assessment, preventative maintenance, coordination of repairs and work orders etc. Recommended Town manages exterior through to the walls and Library maintains the interior.
- Consider approach used with other locations such as one week shut down on an annual basis for repairs and maintenance of the Library.
- Develop a preventative maintenance plan for the Library.
- Explore and customize Town protocols for portable panic/emergency buttons at Library as a safety measure for Library staff. Other safety training for Library staff to help them learn techniques to diffuse situations which may put them at risk.
- Integrate Library room bookings into inventory and Town registration system.

- Enable Town and Library Staff to book room rentals at both locations.

RECOMMENDATIONS SECTION 6: PROCUREMENT

Summary: The Town and Library need to work more closely to leverage the Town Procurement staff's expertise.

- Town Procurement review Library's Procurement Policy and notify when legal updates are required.
- Town Procurement assist with all Library competitive quotations.
- Library to meet with Town Procurement and review if there are any additional opportunities for joint purchasing or opportunity for the Library to participate in shared purchasing arrangements for cost savings.
- Explore alignment of Library procurement policy with the Town's policy.

RECOMMENDATIONS SECTION 7: STRUCTURE

Summary: To be presented and discussed in the Closed Workshop portion of the meeting.

OVERALL GAINS FROM THE REVIEW

1. SYNERGISTIC PARTNERSHIP:

Enhanced partnership and communication between Town and Library resulting in more effective and efficient integration and alignment of services to the community.

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| 2. IMPROVED WORKFLOW: | Efficient and standardized workflow processes that utilize technology to automate work, eliminate manual processes and duplication of effort between the Town and Library in support function tasks e.g. finance. |
| 3. EFFICIENT RESOURCE ALLOCATION: | Established Formal Service Agreements resulting in greater clarity of roles and responsibilities and allocation of resources. Ultimate goal is to ensure the right resources at the right level are completing the right tasks. |
| 4. CULTURE ALIGNMENT: | Greater alignment of Library and Town staff resulting in a breakdown of silos and stronger relationships eventually over time creating a seamless culture. |
| 5. COST SAVINGS/COST AVOIDANCE: | Short and long-term potential. |

SUMMARY AND NEXT STEPS

Overall, the report positions the Library to match its operational needs with adequate resources while taking advantage of synergies and expertise of Town staff and processes. The next steps will be to take the input from this workshop and present recommendations to both Committee of the Whole and the Library Board to facilitate authorization to staff to implement the recommendations.

In addition, the report provides the Library with a scalable operational and management structure for consideration in the context of a proposed comprehensive review of needs and opportunities for future expanded facilities. At Committee of the Whole on May 8, 2017, Community Services Commissioner and Newmarket Public Library Joint Report # 2017-07 regarding Library Facility Needs Assessment was presented.

The motion was to refer this item to staff and bring it forward following the operational efficiency review as per item 8 on the Outstanding Matters List. This item will be brought forward for further consideration in Q1 2018.

As further background information, a separate memo from the Library CEO summarizing Library usage statistics as requested by Council is included in this package.

TOWN BUSINESS PLAN AND STRATEGIC PLAN LINKAGES

Living Balanced

- Arts, culture, entertainment and heritage preservation
- Youth and seniors' facilities and programs
- Increased accessibility for persons with disabilities

Well Equipped and Managed

- Service excellence
- Clear vision of the future and aligned corporate/business plans
- Efficient management of capital assets and municipal services to meet existing and future operational demands

Enhanced Recreational Opportunities

- Enhancing our recreational and community facilities

Efficiency / Financial Management

- Ensuring effective and efficient services

LIBRARY BUSINESS PLAN AND STRATEGIC PLAN LINKAGES

Readying our Capabilities: Organization and Operations

- Restructure our organization to align with new roles

Readying our Capabilities: Spaces

- Develop strategy for future facility and service delivery options

Readying Our Capabilities: Collaborative Relationships

- Connect with community partners to share our vision

CONSULTATION

This project involved 24+ interviews with various Town and Library staff. In addition, the report has been reviewed by the Senior Leadership Team with Commissioners who then initiated preliminary discussions with their department heads as appropriate.

It is important to note that further consultation with affected Town departments is necessary. This consultation will focus on integrating these recommendations into ongoing other reviews happening within the Town as appropriate as well as doing a more in-depth feasibility and implementation analysis.

BUDGET IMPACT

Operating Budget

The consulting assignment cost was \$ 31,000 and was shared between the Town existing operating budget and the Library reserves. This review will result in some direct savings but more importantly will build capacity. Through the recommendations being implemented work planning and new structures will avoid future cost while improving overall service.

Capital Budget

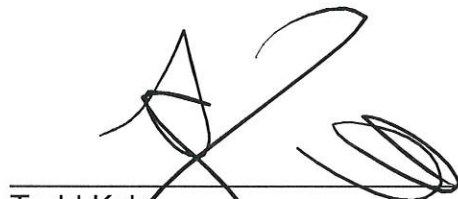
No capital budget impact.

CONTACT

For more information on this report, contact: Ian McDougall at 905-953-5300 x2441 or Todd Kyle at x4670.



Ian McDougall
Commissioner, Community Services



Todd Kyle
CEO, Newmarket Public Library

MEMORANDUM

To: Town of Newmarket Mayor and Council
Newmarket Public Library Board

From: Todd Kyle, CEO, Newmarket Public Library

Date: January 30, 2018

Re: Library output statistics

As further background information to consideration of Library operational efficiencies and facility needs, and in response to requests from Council during discussion of the Library's 2016-2017 Annual Report to the Community, I would like to share some information on the Library's usage levels in the provincial context.

As previously reported, in 2016 the Library commissioned a Peer Comparison Report using data from the Ministry of Tourism, Culture, and Sport. This report notes that:

- NPL rates 15th out of 17 comparators on expenditures per capita (\$37.48 in 2014). By comparison, the top three libraries in terms of total output measures in the study invest approximately 35% - 70% more in library services than NPL.
 - An example is the measure of Circulation Per Capita (the number of times items are borrowed, including digital media). NPL ranks 16th, at 5.5 circulations per capita. In first place is Woodstock Public Library (13.6) which is in 5th place for expenditures per capita (\$58.52). In 5th place is Aurora Public Library (11.4) which is in 1st place for expenditures per capita (\$64.49).
- NPL rates 17th out of 17 comparators in terms of library service points per capita. In other words, Newmarket has the largest population per library branch across all the 17 comparators.
 - Although figures are not compiled province-wide, the Ontario Public Library Guidelines recommend 0.6 – 1.0 square feet per capita of library space. At approximately 35,000 sq. ft., Newmarket provides roughly 0.4. The nearest known comparator is Stratford Public Library which is slightly higher.

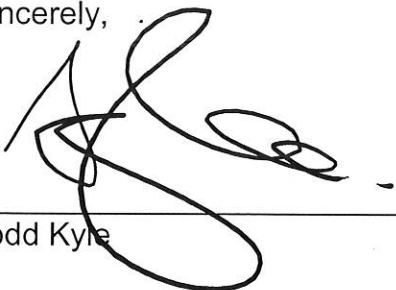
To give further context on the current extent of Library usage in Newmarket, we have examined the reported 25,000 number of library card holders to gauge the level of actual activity of Newmarket residents. That number, as reported according to provincial definitions, reflects cards that were issued or renewed in the previous 24 months.

There are several factors hindering an appropriate measure of the total number of residents actively using their cards. First, digital borrowing is not reported by third-party vendors in a format that identifies individual borrowers. Second, computer workstation use requires a card but is not recorded by the same software as borrowing. In addition, families will often use a single card to borrow items for multiple members. As well, some library usage (attending programs, using resources inside the library) does not require a library card.

Nonetheless, data shows that in the 12 months November 2016 to October 2017, 12017 library cards were either renewed or issued, of which 10218 were used for one or more physical item transactions. If we assume that the rest were used largely for one of the other purposes outlined above, it follows that close to 100% of the renewed or issued cards were used for at least one purpose. It is therefore reasonable to place the number of current active borrowers at roughly 12,000.

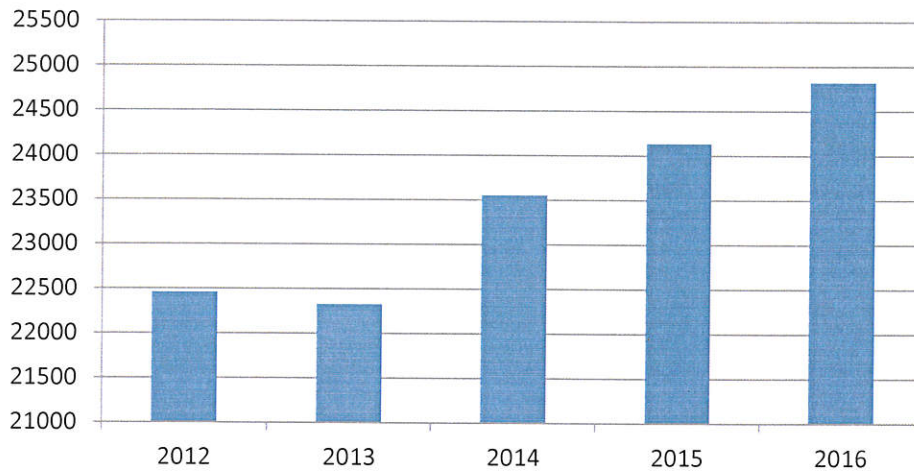
In response to another request from Council for graphic representation of key library output measures over time, a number of charts for 2012-2016 are attached.

Sincerely,



Todd Kyle

Active library cards



Borrowing

