Caledon Public Library Board Meeting
Monday, January 16, 2023
Southfields Village Branch
6:00 PM

AGENDA

1. Call to order
2. Indigenous Acknowledgement

   As we gather, we are reminded that the Caledon Public Library sits on the Treaty Lands and Territory of the Mississaugas of the Credit First Nation. In particular we acknowledge the territory of the Huron-Wendat and Haudenosaunee peoples.

   We acknowledge the cultural injustices of the past and express our collective hope for full truth and reconciliation in the future.

   On this day our meeting place is home to many Indigenous peoples (First Nations, Métis and Inuit) from across Turtle Island (North America).

   We are grateful to have the opportunity to work on this land, and by doing so, we give our respect to its first inhabitants.
3. Apologies for non-attendance
4. Approval of the agenda
5. Disclosure of pecuniary interest
6. Presentation
   a. Comprehensive Growth Plan – Greg Young and Jon Linton, TCI Management Consultants
7. Consent agenda

   (*All items under the Consent Agenda are considered to be routine and have been read by all Board members before the meeting. The items are recommended for approval by the Chair. They may be enacted in one motion. If any member wishes to discuss an item, it can be moved anywhere in the agenda.)*
   a. Minutes of the December 19, 2022 meeting (Attachment 7-A)
   b. CEO/Chief Librarian Report (Attachment 7-B)
   c. Monthly Strategic Actions Update (Attachment 7-C)
   d. Correspondence
8. Business arising from the minutes
9. Staff Reports
   a. Treasurer's Report and Financial Statements (Attachment 9-A)
   b. Quarterly and Year End Performance Measures and Statistics 2022 (Attachment 9-B)
   c. 2022 Strategic Action Year-End Status Report (Attachment 9-C)

d. New Tecumseth Public Library Reciprocal Membership Report (Attachment 9-D)
e. Comprehensive Growth Plan Report (Attachment 9-E)

10. New business
11. Board Work Plan
    a. 2023 Work Plan Review (Attachment 11-A)
12. Public question period
13. Upcoming Events and Development Opportunities
    a. Council General Committee Meeting, Budget – Tuesday, February 14, 2023, 2:30 PM
    b. Council Meeting, Budget – Tuesday, February 28, 2023, 7:00 PM
14. Time and location of next regular meeting
    a. Monday, March 20, 2023, 6:00 PM – Albion Bolton Branch
15. Adjournment

Attached documents:

7-A	Minutes of the December 19, 2022 meeting
7-B	CEO/Chief Librarian Report
7-C	Monthly Strategic Actions Update
9-A	Treasurer's Report and Financial Statements
9-B	Quarterly and Year End Performance Measures and Statistics 2022
9-C	2022 Strategic Action Year-End Status Report
9-D	New Tecumseth Public Library Reciprocal Membership Report
9-E	Comprehensive Growth Plan Report
11-A	2023 Work Plan

Attachment 7-A

Caledon Public Library Board Meeting
Monday December 19th, 2022
6:00 p.m.

MINUTES

Present: Janet Manning (Chair); Paula Civiero (Vice-Chair); David Betty; Sheralyn Roman; Catherine Jackson; Brenda Clark

Staff: Colleen Lipp – CEO | Chief Librarian

Absent: Jacquie Iafrate; Councillor Tony Rosa; Councillor Christina Early

Note: This hybrid meeting was hosted at the Albion Bolton Branch

1. **The Chair called the meeting to order at 6:07 PM**

2. **Indigenous Acknowledgment**

As we gather, we are reminded that the Caledon Public Library sits on the Treaty Lands and Territory of the Mississaugas of the Credit First Nation. In particular we acknowledge the territory of the Huron-Wendat, and Haudenosaunee peoples.

We acknowledge the cultural injustices of the past and express our collective hope for full truth and reconciliation in the future.

On this day our meeting place is home to many Indigenous peoples (First Nations, Métis and Inuit) from across Turtle Island (North America).

We are grateful to have the opportunity to work on this land, and by doing so, we give our respect to its first inhabitants.

3. **Apologies for non-attendance:** Jacquie Iafrate

4. **Approval of the Agenda**
   Motion: That the Caledon Public Library Board approve the agenda.
   Moved: David Betty **Seconded:** Sheralyn Roman
   Carried.

5. **Disclosure of pecuniary interest:** None

6. **Consent Agenda**
   a. **Minutes of the November 21st, 2022 meeting**
   b. **CEO/Chief Librarian Report**
   c. **Monthly Strategic Actions Update**
   d. **Correspondence**

Motion: That the Caledon Public Library Board receive all reports within the consent agenda.
Moved: Paula Civiero **Seconded**: David Betty
Carried.

7. Business arising from the minutes:

8. Staff Reports

a. Treasurer's Report and Financial Statements

Motion: That the Caledon Public Library Board receive the Treasurer's Report and related monthly financials.
Moved: Paula Civiero **Seconded:** Sheralyn Roman
Carried.

9. Board and Committee Reports

a. Advocacy and Fundraising Committee Meeting Minutes of December 8, 2022

Motion: That the Caledon Public Library Board receive the Advocacy and Fundraising Committee Minutes of December 8, 2022.
Moved: David Betty **Seconded:** Paula Civiero
Carried.

b. Board Annual Evaluation Results

The Board Chair provided a verbal report, highlighting survey results and comments received.
Motion: That the Caledon Public Library Board receive the reported results.
Moved: David Betty **Seconded:** Sheralyn Roman
Carried.

10. CLOSED SESSION

Motion: That the Caledon Public Library Board move into closed session for the purpose of discussing the following:
a. Confidential Report re: Personal matters about an identifiable individual – CEO/Chief Librarian Annual Performance Appraisal
Moved: Paula Civiero **Seconded:** David Betty
Carried at 6:35 PM

All members in attendance and the CEO/Chief Librarian moved into closed session.

Motion: That the Caledon Public Library Board resume open session.
Moved: Sheralyn Roman **Seconded:** David Betty
Carried at 6:49 PM

Open session resumed.

Brenda Clark joined the meeting during closed session at 6:37

a. Confidential Report re: Personal matters about an identifiable individual – CEO/Chief Librarian Mid-Year Performance Appraisal.

Motion: That the Caledon Public Library Board receive the CEO/Chief Librarian's Mid-Year Performance Appraisal.
Moved: David Betty **Seconded:** Sheralyn Roman
Carried.

11. New Business: none

12. Board Work Plan

a. 2022 Board Work Plan Review

Motion: That the Caledon Public Library Board receive the 2022 Work Plan.
Moved: Brenda Clark **Seconded:** Sheralyn Roman
Carried.

13. Public Question Period: No members of the public were present.

14. Upcoming Events and Development Opportunities

a. Budget Presentation to Council – Tuesday, January 10, 2023, 2:30 PM

b. Budget Public Open House – Wednesday, January 18, 2023 – Time and format to be confirmed

c. Council General Committee Meeting, Budget – Tuesday, February 7, 2023, 2:30 PM

d. Council Meeting, Budget – Tuesday, February 28, 2023, 7:00 PM

15. Time of next regular meeting:

a. Monday, January 16, 2022, 6:00 PM – Southfields Village Branch

16. Adjournment

Motion: That the meeting adjourn.
Moved: David Betty **Seconded:** Paula Civiero
Carried.

The meeting adjourned at 6:57 PM

_____ _____

Janet Manning
Chair

Colleen Lipp
CEO | Chief Librarian

Attachment 7-B

CEO/Chief Librarian's Report

Prepared by Colleen Lipp
January 2023

Library Services

Age-Friendly Task Force

At the Town Council meeting held on December 13, 2022, Council adopted a resolution regarding the new Age-Friendly Task Force (ATFF). Previously known as the Seniors Task Force, the ATFF will serve as the steering committee for the municipality's Age-Friendly Action Plan. Revised terms of reference have also been developed in support of this new task force. As per these terms, the structure of the 13 member task force includes one staff representative from the Caledon Public Library. A staff member will be selected by the Library's Management Team to fill this role for the four-year term ending in 2026. This will further support the Library's efforts to work collaboratively with the Town to meet the needs of Caledon's quickly growing community of those age 55 and up.

Library Governance

Board Member Appreciation

As a means of recognizing the Board's valuable contributions over the last term, the Library will be adding book plates to selected titles in honour of their service. Each Board member will be acknowledged individually through books that reflect their individual interests and reading preferences. A brief survey has been created as a means of collecting this information and will be made available in print at the January meeting.

Board Member Appointment

A Closed Session report, prepared by the Office of the Town Clerk to provide an overview of the applicants to the Board, will be received and reviewed by the General Committee of Council on January 17th. A motion identifying applicants appointed to the new term will be passed upon Council's return to open session and will be confirmed at the January 31st Council meeting. Correspondence to those selected will be issued by the Mayor's office following the January 31st meeting. The CEO/Chief Librarian will also reach out to all members of the new term in order to schedule one-on-one meetings in advance of the regular March Board meeting. Those whose applications were not successful will be notified by the Town Clerk.

Staffing News

Staff Engagement Survey

Insightlink Communications was again retained to complete a staff survey as a means of measuring employee engagement. As per the Library's strategic action plan, survey results will provide insights related to staff morale and satisfaction. Survey insights will be benchmarked against responses received in 2019. To this end, with the exception of a question regarding the Library's response to the pandemic, all questions mirror those previously asked.

The survey closed on December 23rd with an 87% participation rate. Forthcoming reports will include a comprehensive strategic analysis of survey results and a summary of employee motivations and drivers. The resulting data and documentation will strengthen our efforts to move from survey results to action. An overview of survey results will be shared with the Board in the new term. Responses related to the CEO's performance will also be shared with the new CEO Evaluation Committee as a means of informing the annual performance appraisal.

Advancing Public Library Leadership (APLL) Institute

Acting Branch Manager Natalie Spaan has been accepted into the new cohort of the Advancing Public Library Leadership (APLL) Institute. This two-year certificate program is designed to expand and advance the leadership capacity of public libraries and support strong succession planning. Natalie marks the seventh member of the CPL team to participate in the APLL program.

Attachment 7-C

Strategic Actions Update

January 2023

Grow and Innovate

As per the identified action to "Invest in the development of all staff to build the necessary knowledge, skills, and confidence to guide and support library users", staff representatives and members of the management team participated in the following learning opportunities over the past month:

- BLUEcloud Analytics for Symphony training
- eLearning for Libraries symposium
- Family Literacy Excel course completed
- Niche Academy: ESL Conversation Groups: Up Close and Personal
- Symphony Administration training
- You Belong @ Your Library: Programming for Adults with Developmental Disabilities webinar

Respond to Community Needs

Programs for children, tweens and families included:

- Story Times
- Winter Celebrations Around the World
- Snowy Night Story Time
- Kids Book Box - Snow Much Fun!
- Winter Reading Challenge for Kids (tied to Kids Book Boxes, using Beanstack)

Programs for teens included:

- Humberview Book Club
- Pride book club in partnership with Brampton and Mississauga Public Libraries
- Tech Savvy Teens
- Teen Book Box - Winter Edition
- Winter Reading Challenge for Teens (tied to Teen Book Boxes, using Beanstack)

Programs for Adults included:

- Pride book club in partnership with Brampton and Mississauga Public Libraries
- Maintaining Healthy Self-image during illness in partnership with Bethell Hospice
- Knit and Knatter
- Book Clubs
- Art Clubs
- Writer's Ink

Celebrate Culture and Inclusion

Family Literacy Day Art Exhibit was launched. To garner interest and engagement around Family Literacy Day (Jan. 27th), staff created a self-directed activity inviting children to design a special book jacket cover. Creations are being displayed via virtual and inhouse art exhibits.

Demonstrate our Value

Staff represented CPL at the Town's 19th annual Winterfest Celebration

The Valentines for Vets program is being offered across all branches. This self-directed activity invites children to create a special hand-made valentine that included messages of thanks and gratitude to veterans for their service. Valentines will be distributed to veterans across Canada in time for February 14th.

Attachment 9-A

Treasurer's Report

Prepared by Colleen Lipp
January 2023

CALEDON PUBLIC LIBRARY
for all reasons

2022 Budget

Financial statements reflecting the operating and capital budgets as of December 31, 2022 are attached as Appendix A. Several items remain outstanding as a number of invoices, receipts, transfers and accruals are not yet reflected. These will result in a change to the operating surplus of $368,792 currently referenced within the appendix. A final budget document will be shared as part of the March 2023 Treasurer's Report. In the interim, items of note include:

- Revenues received from printing services, book sale and lost materials have been processed but are not yet reflected within the Town's budget tracking software.
- Donations totaling $384 were received in December via CanadaHelps. Transfers to the Town have been initiated but are not yet reflected in the attached budget update. As per the relevant CPL policy, "unexpended funds raised in any given year shall be transferred to the Donation and Bequest Reserve Fund at the end of that fiscal year".
- Revenues of $2500 received from the Friends of the Caledon Public Library to be used for towards the purchase of a 3D printer will be accrued to 2023 as the hardware has not yet been procured.
- As previously reported, the significant unfavourable variance within Administration's Contracted Services is largely the result of unbudgeted legal and HR services. All outstanding cases have been closed and all final invoices will be allocated to the 2022 budget. No further related expenses are expected in 2023.

As per the relevant portion of the Town of Caledon Purchasing By-Law, "the Chief Librarian shall prepare and present to the Library Board a report summarizing all purchases between $10,000 and $50,000 twice annually". With the exception of consolidated invoices for library print and A/V materials and final construction costs for the Albion Bolton Branch renovation, the following reflects relevant purchases during the last seven months of 2022. Please note that not all of these expenses have yet been fully reflected within the attached financial statement.

- Management recruitment services of $14,000 (excluding HST);
- Work to date on the Library's Comprehensive Growth Plan, completed at a cost of $66,402 (excluding HST);
- Refresh of existing laptops at a cost of $12,762 (excluding HST);
- Payments totaling $80,164 (excluding HST) for the design and pre-construction services to the contractors tasked with the improvements to the Margaret Dunn Valleywood Collaboration Studio; and,
- A 50% deposit of $28,656 (excluding HST) for furniture for the renovated studio.

As referenced within the Donation and Bequest Reserve Fund Policy (CPL-20-27), “staff will provide the Board with a summary of all disbursements from the Donation and Bequest Reserve twice annually”. No disbursements were made from the reserve within the last half of 2022.

2023 Budget

The Town’s consolidated 2023 budget was presented at a General Committee Meeting of Council on January 10, 2023. The presentation included a general budget overview as well as highlights by several municipal departments as well as the Caledon Public Library. There were no questions raised in regards to any proposed service level changes or capital projects. It is expected that questions will be considered by Council in preparation for the General Committee budget deliberations now scheduled for February 14, 2023. A follow-up email has been shared with the Mayor and all members of Council, inviting them to meet with the CEO/Chief Librarian to discuss any questions regarding the Board’s recommended investment in library services.

Grants

Ontario Library Service Connectivity Funding

The Ontario Library Services (OLS) recently announced the upcoming receipt of up to $460,000 in connectivity funding from the Ministry of Tourism, Culture and Sport for the provincial fiscal year ending March 31, 2023. As in past years, OLS has been tasked with distributing these funds to eligible public libraries. Libraries serving population under 20,000 are eligible to be reimbursed for 100% of their eligible connectivity costs. Libraries serving populations over 20,000 and that have previously received funding will be partially reimbursed based on the availability of remaining funds..

CPL has submitted a request for reimbursement. Given the general increase to connectivity costs across the library sector, it is expected that funds received by CPL in 2023 may fall short of the $5640 received in 2022. It is anticipated that funds will be received by January 31, 2023.

Recommended Motion:

> *That the Caledon Public Library Board receive the Treasurer’s Report and related financials*

Appendix A

TOWN OF CALEDON

Caledon Public Library
RC: Object Code - Budget vs Actual by Cost Centre
As of December 31, 2022

	December	December	*Monthly*		YTD	YTD	*YTD*		Annual	Percentage	**Annual**
	Budget	Actuals	*Variance*		Budget	Actuals	*Variance*		Budget	Expended	**Variance**
40010 Administration											
50050 Miscellaneous	-750.00		*-750.00*		-9,000.00	-4,874.85	*-4,125.15*		-9,000.00	54.2%	**-4,125.15**
50125 Merchandise Sales	-250.00		*-250.00*		-3,000.00	-391.90	*-2,608.10*		-3,000.00	13.1%	**-2,608.10**
50319 Grants/Subsidies					-58,200.00	-58,171.00	*-29*		-58,200.00	100.0%	**-29.00**
50570 Donations	-87.00		*-87.00*		-1,000.00	-6,084.41	*5,084.41*		-1,000.00	608.4%	**5,084.41**
50582 Sponsor			*0.00*			-266.00	*266.00*				**266.00**
50705 Fines/Fees	-837.00		*-837.00*		-10,000.00	-3,651.49	*-6,348.51*		-10,000.00	36.5%	**-6,348.51**
50715 Programs	-288.00		*-288.00*		-3,500.00	-239.50	*-3,260.50*		-3,500.00	6.8%	**-3,260.50**
50725 Comm.Access Prgm Funding			*0.00*		-7,000.00	-5,639.52	*-1,360.48*		-7,000.00	80.6%	**-1,360.48**
50750 Book Sales	-135.00		*-135.00*		-2,500.00	-335.55	*-2,164.45*		-2,500.00	13.4%	**-2,164.45**
50770 FOL-Recoverable						-2,500.00	*2,500.00*				**2,500.00**
50986 Reserve Fund To Revenue						-2,983.65					**2,983.65**
61510 Salaries-Permanent	39,871.00	35,162.20	*4,708.80*		288,733.00	239,456.55	*49,276.45*		288,733.00	82.9%	**49,276.45**
61513 Benefits-Permanent	10,359.00	8,056.62	*2,302.38*		79,969.00	63,595.70	*16,373.30*		79,969.00	79.5%	**16,373.30**
62018 Operating Supplies	56.00	76.75	*-20.75*		760.00	228.44	*531.56*		760.00	30.1%	**531.56**
62113 Maint & Repairs-A/V Equip	2,000.00		*2,000.00*		4,000.00	1,623.07	*2,376.93*		4,000.00	40.6%	**2,376.93**
62129 FOL-Initiatives						167.85	*-167.85*				**-167.85**
62244 Bank Charges	300.00		*300.00*		3,600.00	2,185.52	*1,414.48*		3,600.00	60.7%	**1,414.48**
62253 Lib. Brd Education & Exp.	400.00	189.09	*210.91*		5,000.00	2,887.69	*2,112.31*		5,000.00	57.8%	**2,112.31**
62310 Training/Development/Seminars	2,000.00	4,827.78	*-2,827.78*		39,661.00	25,484.65	*14,176.35*		39,661.00	64.3%	**14,176.35**
62311 Memberships/Dues			*0.00*		12,500.00	11,795.99	*704.01*		12,500.00	94.4%	**704.01**
62314 Mileage	903.00	494.01	*408.99*		9,000.00	3,243.92	*5,756.08*		9,000.00	36.0%	**5,756.08**
62315 Printing & Advertising						69.37	*-69.37*				**-69.37**
62317 Audit	4,370.00	4,647.89	*-278*		4,370.00	132.80	*4,237.20*		4,370.00	3.0%	**4,237.20**
62322 Postage	130.00	202.08	*-72.08*		2,000.00	1,051.44	*948.56*		2,000.00	52.6%	**948.56**
62335 Contracted Services	277.00	1,795.50	*-1,518.50*		3,500.00	37,846.86	*-34,346.86*		3,500.00	1081.3%	**-34,346.86**
62342 Donations			*0.00*			5,136.89	*-5,136.89*				**-5,136.89**
62378 Furniture/Fixtures			*0.00*		2,500.00	2,544.00	*-44.00*		2,500.00	101.8%	**-44.00**
Total 40010 Administration	58,319.00	55,451.92	*2,867.08*		361,393.00	312,312.87	*49,080.13*		361,393.00	86.4%	**49,080.13**
40020 Emergency Management											
50986 Reserve Fund To Revenue	-577.00		*-577.00*		-9,560.00	-6,943.45	*-2,616.55*		-9,560.00	72.6%	**-2,616.55**
62018 Operating Supplies			*0.00*		3,200.00	4,666.59	*-1,466.59*		3,200.00	145.8%	**-1,466.59**
62335 Contracted Services						291.05	*-291.05*				**-291.05**
Total 40020 Emergency Management	-577.00	0.00	*-577.00*		-6,360.00	-1,985.81	*-4,374.19*		-6,360.00	31.2%	**-4,374.19**
41010 Library Public Services											
61510 Salaries-Permanent	83,006.00	89,965.39	*-6,959.39*		715,232.00	713,855.80	*1,376.20*		715,232.00	99.8%	**1,376.20**
61513 Benefits-Permanent	22,394.00	20,805.81	*1,588.19*		223,408.00	214,045.01	*9,362.99*		223,408.00	95.8%	**9,362.99**
61520 Wages-Casual Temporary	106,363.00	67,707.83	*38,655.17*		697,700.00	558,465.30	*139,234.70*		697,700.00	80.0%	**139,234.70**
61523 Benefits-Casual Temporary	15,437.00	9,501.37	*5,935.63*		110,113.00	79,274.82	*30,838.18*		110,113.00	72.0%	**30,838.18**
62017 Caretaking Supplies	238.00		*238.00*		2,700.00	284.74	*2,415.26*		2,700.00	10.5%	**2,415.26**

TOWN OF CALEDON

Caledon Public Library
RC: Object Code - Budget vs Actual by Cost Centre
As of December 31, 2022

	December Budget	December Actuals	*Monthly Variance*	YTD Budget	YTD Actuals	*YTD Variance*	Annual Budget	Percentage Expended	**Annual Variance**
62018 Operating Supplies	483.00	1,906.09	*-1,423.09*	5,242.00	10,602.16	*-5,360.16*	5,242.00	202.3%	**-5,360.16**
62312 Insurance				3,909.00	4,063.04	*-154.04*	3,909.00	103.9%	**-154.04**
62321 Rental-Facility			*0.00*	310,303.00	309,546.91	*756.09*	310,303.00	99.8%	**756.09**
62335 Contracted Services	3,904.00	2,640.68	*1,263.32*	49,600.00	46,253.34	*3,346.66*	49,600.00	93.3%	**3,346.66**
62346 Courier	4,540.00	3,608.41	*931.59*	49,100.00	29,884.25	*19,215.75*	49,100.00	60.9%	**19,215.75**
Total 41010 Library Public Services	236,365.00	196,135.58	*40,229.42*	2,167,307.00	1,966,275.37	*201,031.63*	2,167,307.00	90.7%	**201,031.63**
41015 Information Services									
61510 Salaries-Permanent	45,376.00	45,663.28	*-287.28*	391,288.00	392,712.49	*-1,424.49*	391,288.00	100.4%	**-1,424.49**
61513 Benefits-Permanent	12,273.00	10,354.22		123,683.00	117,968.97	*5,714.03*	123,683.00	95.4%	**5,714.03**
61520 Wages-Casual Temporary	14,924.00	15,918.44	*-994.44*	104,600.00	105,404.24	*-804.24*	104,600.00	100.8%	**-804.24**
61523 Benefits-Casual Temporary	3,206.00	2,796.31	*409.69*	22,449.00	17,671.90	*4,777.10*	22,449.00	78.7%	**4,777.10**
62018 Operating Supplies	273.00	32.33	*240.67*	3,300.00	4,538.80	*-1,238.80*	3,300.00	137.5%	**-1,238.80**
62058 Online Databases			*0.00*	87,000.00	82,310.40	*4,689.60*	87,000.00	94.6%	**4,689.60**
62414 Special Programs	500.00	230.97	*269.03*	8,000.00	2,884.61	*5,115.39*	8,000.00	36.1%	**5,115.39**
Total 41015 Information Services	76,552.00	74,995.55	*1,556.45*	740,320.00	723,491.41	*16,828.59*	740,320.00	97.7%	**16,828.59**
41020 Library Grants									
50319 Grants/Subsidies (Revenue)			*0.00*		-7,135.85	*7,135.85*			**-7,135.85**
62319 Grants (Expenses)		68.08	*-68.08*		4,396.79	*-4,396.79*			**4,396.79**
Total 41020 Library Grants		68.08	*-68.08*		-2,739.06	*2,739.06*			**2,739.06**
41025 Library Info Technology									
61510 Salaries-Permanent	27,888.00	39,546.90	*-11,658.90*	240,507.00	217,294.58	*23,212.42*	240,507.00	90.3%	**23,212.42**
61511 Overtime-Permanent			*0.00*		989.01	*-989.01*			**-989.01**
61513 Benefits-Permanent	7,346.00	9,436.97	*-2,090.97*	73,970.00	70,365.71	*3,604.29*	73,970.00	95.1%	**3,604.29**
62018 Operating Supplies	387.00	1,889.73	*-1,502.73*	4,600.00	8,731.29	*-4,131.29*	4,600.00	189.8%	**-4,131.29**
62303 New Staff Technology		2,655.94	*-2,655.94*	4,400.00	2,655.94	*1,744.06*	4,400.00	60.4%	**1,744.06**
62304 Automation	1,425.00	23.20	*1,401.80*	29,600.00	38,164.50	*-8,564.50*	29,600.00	128.9%	**-8,564.50**
62305 Computer Services	10,493.00	6,341.05	*4,151.95*	112,980.00	68,052.38	*44,927.62*	112,980.00	60.2%	**44,927.62**
62312 Insurance			*0.00*	4,420.00	4,250.88	*169.12*	4,420.00	96.2%	**169.12**
62335 Contracted Services	1,405.00	1,338.00	*67.00*	18,310.00	12,172.50	*6,137.50*	18,310.00	66.5%	**6,137.50**
62396 Mobile Phones / Pagers	914.00	569.26	*344.74*	9,640.00	5,767.14	*3,872.86*	9,640.00	59.8%	**3,872.86**
62397 Telephone	3,769.00	2,574.15	*1,194.85*	31,070.00	25,707.20	*5,362.80*	31,070.00	82.7%	**5,362.80**
63037 Software Licence Subscription	3,170.00		*3,170.00*	30,070.00	20,574.37	*9,495.63*	30,070.00	68.4%	**9,495.63**
Total 41025 Library Info Technology	56,797.00	64,375.20	*-7,578.20*	559,567.00	474,725.50	*84,841.50*	559,567.00	84.8%	**84,841.50**
41030 Youth Services									
61510 Salaries-Permanent	37,976.00	24,075.96	*13,900.04*	327,834.00	298,520.92	*29,313.08*	327,834.00	91.1%	**29,313.08**
61513 Benefits-Permanent	9,925.00	5,156.08	*4,768.92*	102,500.00	89,342.27	*13,157.73*	102,500.00	87.2%	**13,157.73**
61520 Wages-Casual Temporary		8,196.12	*-8,196.12*		26,778.99	*-26,778.99*			**-26,778.99**
61523 Benefits-Casual Temporary		996.75	*-996.75*		3,248.87	*-3,248.87*			**-3,248.87**
62018 Operating Supplies	60.00	13.98	*46.02*	1,200.00	430.82	*769.18*	1,200.00	35.9%	**769.18**
62414 Special Programs	310.00	449.38	*-139.38*	20,000.00	14,153.18	*5,846.82*	20,000.00	70.8%	**5,846.82**
Total 41030 Youth Services	48,271.00	38,888.27	*9,382.73*	451,534.00	432,475.05	*19,058.95*	451,534.00	95.8%	**19,058.95**

TOWN OF CALEDON

Caledon Public Library
RC: Object Code - Budget vs Actual by Cost Centre
As of December 31, 2022

	December Budget	December Actuals	*Monthly Variance*	YTD Budget	YTD Actuals	*YTD Variance*	Annual Budget	Percentage Expended	**Annual Variance**
41035 Communications/Community Dev									
61510 Salaries-Permanent	37,767.00	39,023.11	*-1,256.11*	327,054.00	330,119.92	*-3,065.92*	327,054.00	100.9%	**-3,065.92**
61513 Benefits-Permanent	9,756.00	8,495.48	*1,260.52*	100,791.00	97,819.32	*2,971.68*	100,791.00	97.1%	**2,971.68**
61520 Wages-Casual Temporary	-5.00		*-5.00*	-6.00	5,960.23	*-5,966.23*	-6		**-5,966.23**
61523 Benefits-Casual Temporary			*0.00*		918.87	*-918.87*			**-918.87**
62018 Operating Supplies	424.00	13.98	*410.02*	5,000.00	5,951.97	*-951.97*	5,000.00	119.0%	**-951.97**
62304 Automation	533.00	16.41	*516.59*	7,000.00	4,417.51	*2,582.49*	7,000.00	63.1%	**2,582.49**
62315 Printing & Advertising	1,698.00		*1,698.00*	16,000.00	13,188.72	*2,811.28*	16,000.00	82.4%	**2,811.28**
62335 Contracted Services	500.00	198.19	*301.81*	6,000.00	6,665.18	*-665.18*	6,000.00	111.1%	**-665.18**
62414 Special Programs	500.00	101.58	*398.42*	8,000.00	6,215.94	*1,784.06*	8,000.00	77.7%	**1,784.06**
Total 41035 Communications/Community Dev	51,173.00	47,848.75	*3,324.25*	469,839.00	471,257.66	*-1,418.66*	469,839.00	100.3%	**-1,418.66**
Total Caledon Public Library-Lending Services	**526,900.00**	**477,763.35**	**49,136.65**	**4,743,600.00**	**4,375,812.99**	**367,787.01**	**4,743,600.00**	**92.2%**	**367,787.01**

Capital Project Expense Report - as of December 31, 2022

	Budget	Expended Previous Year(s)	Expended 2022 YTD	Total Project Spend to Date	Remaining Funding	Percentage Expended	Status
Capital Projects - Previous Years							
19-036 Albion Bolton Branch Refurbishment	641,000.00	367,894.24	270,572.36	638,466.60	2,533.40	99.6%	Closed
20-014 Library IT Equipment	125,485	58,760.06	38,165.55	96,925.61	28,559.39	77.2%	
20-015 Library Furnishings	60,000	49,150.17	11,884.45	61,034.62	-1,034.62	101.7%	Closed
21-007 Library Collections and Materials	450,000.00	382,209.84	70,395.30	452,605.14	-2,605.14	100.6%	
59275 Capital Donations	878.62						Closed
Total Library Collections and Materials (21-007)	450,878.62	382,209.84	70,395.30	452,605.14	-1,726.52	100.4%	
21-008 Library IT Equipment	73,000.00	1,730.35		1,730.35	71,269.65	2.4%	
21-009 Library Hotspot Replacement	10,200.00	5,724.00	343.44	6,067.44	4,132.56	59.5%	
21-011 Library Furniture Replacement	40,000.00		43,306.30	43,306.30	-3,306.30	108.3%	Closed
21-013 MDV Renovation to Maker, Media and Innovation	304,680.00		65,354.16	65,354.16	239,325.84	21.5%	Partially grant funded
21-131 Library Automatic Doors	36,691.00	14,218.41	11,927.80	26,146.21	10,544.79	71.3%	Fully grant funded
21-134 Southfields Village Branch Reading Garden	91,910.00		87,622.85	87,622.85	4,287.15	0.0%	Fully grant funded
Capital Projects - Current Year							
22-019 Library Collections and Materials	450,000.00		354,209.20	354,209.20	95,790.80	78.7%	
22-020 Library IT Equipment	51,000.00			0.00	51,000.00	0.0%	
22-021 Library Furniture Replacement	120,000.00		62,343.08	64,790.33	55,209.67	54.0%	
22-022 Library Master Plan	100,000.00		39,564.17	39,564.17	60,435.83	39.6%	
22-025 Library In-Branch Signage/Wayfndng	24,000.00		1,638.34	11,183.43	12,816.57	46.6%	
22-026 Library and Town Joint Technology Review	35,000.00			0.00	35,000.00	0.0%	
22-027 Library Print Mgmt/Wireless Printing	12,000.00			0.00	12,000.00	0.0%	

Library Reserve Balances - as of December 31, 2022

01-00-000-00000-000-20841 Library Bequest Fund - MDV	316.54
08-07-900-35043-000-25000 Library Reserve Fund	4,921.62

Attachment 9-B

Quarterly and Annual Performance Measures and Statistics

Annual Dashboard - Year End 2022

CALEDON PUBLIC LIBRARY
for all reasons

Active Library Members

15,247 ↑ 24.9%

Branch Visits

151,600 ↑ 213.3%

Total Items Borrowed and Used

404,901 ↑ 37.4%

Digital Titles Borrowed

90,134 ↓ -1.6%

Digital Resources Accessed

44,359 ↑ 2.9%

Program Participation

11,808 ↑ 18.8%

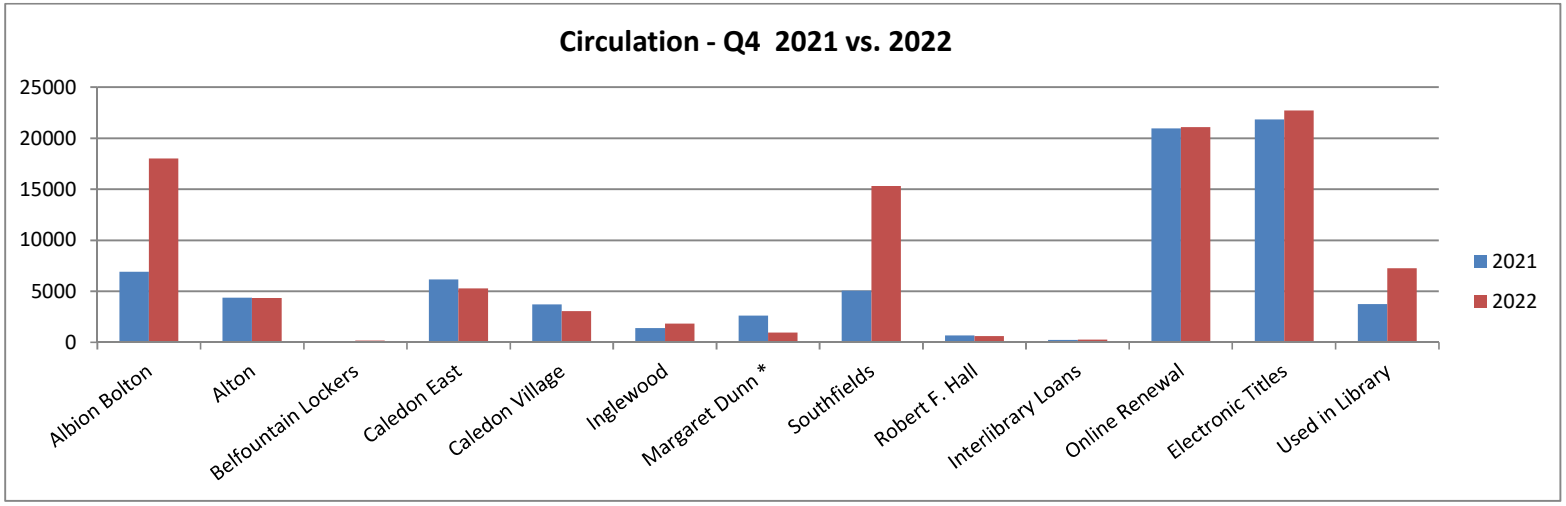
Quarterly Performance Measures and Statistics

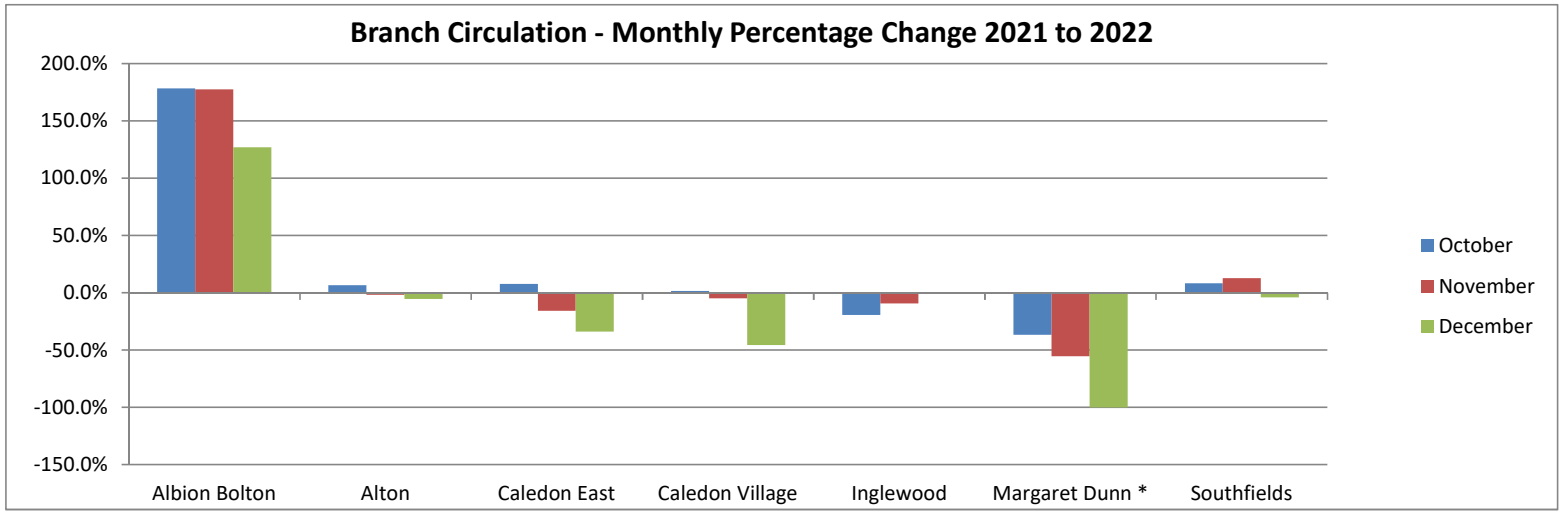
Fourth Quarter - October, November, December 2022

Circulation by Branch - Q4

	October			November			December			Q4 Total			YTD		
	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change
Albion Bolton	2234	6219	178.4%	2289	6354	177.6%	2392	5430	127.0%	6915	18003	160.3%	34213	56644	65.6%
Alton	1306	1394	6.7%	1440	1414	-1.8%	1614	1530	-5.2%	4360	4338	-0.5%	15670	17832	13.8%
Belfountain Lockers	33	58	75.8%	31	62	100.0%	41	47	14.6%	105	167	59.0%	218	492	125.7%
Caledon East	2031	2187	7.7%	2054	1731	-15.7%	2063	1364	-33.9%	6148	5282	-14.1%	19886	26585	33.7%
Caledon Village	1108	1127	1.7%	1243	1184	-4.7%	1373	746	-45.7%	3724	3057	-17.9%	13369	14694	9.9%
Inglewood	728	588	-19.2%	662	601	-9.2%	0	648	-	1390	1837	32.2%	6982	6410	-8.2%
Margaret Dunn *	930	590	-36.6%	840	375	-55.4%	845	0	-100.0%	2615	965	-63.1%	8967	8380	-6.5%
Southfields	5035	5456	8.4%	5002	5640	12.8%	4398	4224	-4.0%	5051	15320	203.3%	23219	65982	184.2%
Robert F. Hall	239	191	-20.1%	280	251	-10.4%	171	180	5.3%	690	622	-9.9%	829	1967	137.3%
Interlibrary Loans	70	90	28.6%	98	117	19.4%	79	51	-35.4%	247	258	4.5%	247	860	248.2%
Online Renewal	7037	7274	3.4%	6884	6793	-1.3%	7035	7024	-0.2%	20956	21091	0.6%	72975	82411	12.9%
Sub-Total	20751	25174	21.3%	20823	24522	17.8%	20011	21244	6.2%	61585	70940	15.2%	196575	282257	43.6%
Electronic Titles	7443	7608	2.2%	7164	7708	7.6%	7241	7397	2.2%	21848	22713	4.0%	91571	90184	-1.5%
	28194	32782	16.3%	27987	32230	15.2%	27252	28641	5.1%	83433	93653	12.2%	288146	372441	29.3%
Used in Library	1174	2890	146.2%	1657	2692	62.5%	919	1667	81.4%	3750	7249	93.3%	6623	32460	390.1%
Total	29368	35672	21.5%	29644	34922	17.8%	28171	30308	7.6%	87183	100902	15.7%	294769	404901	37.4%

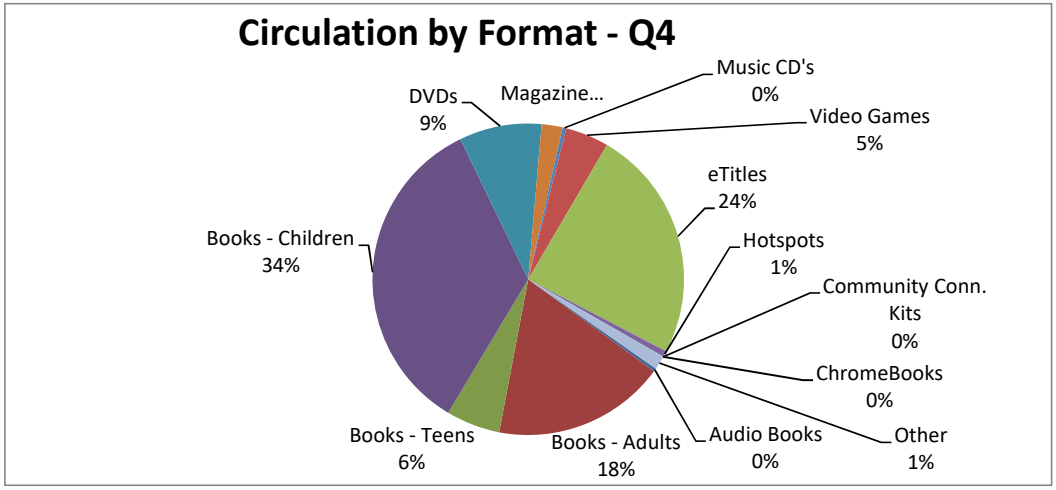
* The Margaret Dunn Valleywood Branch closed as of November 28 in preparation for construction.





Circulation by Format - Q4

	October			November			December			Q4 Total			YTD		
	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change
Audio Books	153	84	-45.1%	182	110	-39.6%	128	104	-18.8%	463	298	-35.6%	1442	1104	-23.4%
Books - Adults	4985	5865	17.7%	4937	5649	14.4%	4936	5308	7.5%	14858	16822	13.2%	55410	65174	17.6%
Books - Teens	1796	1990	10.8%	1589	1739	9.4%	1402	1506	7.4%	4787	5235	9.4%	13964	21118	51.2%
Books - Children	9222	11683	26.7%	9390	11496	22.4%	8358	8885	6.3%	26970	32064	18.9%	84960	127579	50.2%
DVDs	2497	2605	4.3%	2457	2633	7.2%	2810	2769	-1.5%	7764	8007	3.1%	29118	32640	12.1%
Magazines	551	653	18.5%	588	775	31.8%	621	613	-1.3%	1760	2041	16.0%	5730	7579	32.3%
Music CD's	38	100	163.2%	53	130	145.3%	93	123	32.3%	184	353	91.8%	761	1136	49.3%
Video Games	996	1464	47.0%	1062	1351	27.2%	1164	1394	19.8%	3222	4209	30.6%	8416	16725	98.7%
eTitles	7443	7608	2.2%	7164	7708	7.6%	7241	7397	2.2%	21848	22713	4.0%	91571	90184	-1.5%
Hotspots	198	186	-6.1%	187	186	-0.5%	171	185	8.2%	556	557	0.2%	2116	2269	7.2%
ChromeBooks	24	16	-33.3%	9	17	88.9%	5	8	60.0%	38	41	7.9%	60	209	248.3%
Community Conn. Kits	1	11	1000.0%	4	6	50.0%	1	3	200.0%	6	20	233.3%	24	111	362.5%
Other	290	517	78.3%	365	430	17.8%	322	346	7.5%	977	1293	32.3%	3958	6613	67.1%
Total	28194	32782	16.3%	27987	32230	15.2%	27252	28641	5.1%	83433	93653	12.2%	297530	372441	25.2%



Library Activity - Q4

	October			November			December			Q4 Total			YTD		
	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change
New Members Added	352	428	21.6%	345	312	-9.6%	197	205	4.1%	894	945	5.7%	2766	4467	61.5%
Total Members/Cardholders										26286	23918	-9.0%			
Total Active Members/Cardholders (used withing last two years)										12211	15247	24.9%			
Reference Queries	242	156	-35.5%	288	197	-31.6%	175	140	-20.0%	705	493	-30.1%	1648	2128	29.1%
Holds Placed	5370	4924	-8.3%	5670	5064	-10.7%	5892	4944	-16.1%	16932	14932	-11.8%	81615	67637	-17.1%
New Materials Added	2282	1540	-32.5%	2326	2677	15.1%	1466	1813	23.7%	6074	6030	-0.7%	21028	21437	1.9%

Visits by Branch - Q4

	October			November			December			Q4 Total			YTD		
	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change
Albion Bolton	1060	4619	335.8%	1278	4722	269.5%	860	4090	375.6%	3198	13431	320.0%	11294	35950	218.3%
Alton	361	513	42.1%	614	544	-11.4%	232	408	75.9%	1207	1465	21.4%	3480	5698	63.7%
Caledon East	1322	1041	-21.3%	1477	841	-43.1%	825	588	-28.7%	3624	2470	-31.8%	6797	11682	71.9%
Caledon Village	301	337	12.0%	610	366	-40.0%	263	261	-0.8%	1174	964	-17.9%	3577	4618	29.1%
Inglewood	193	205	6.2%	304	260	-14.5%	0	208	-	497	673	35.4%	1784	2076	16.4%
Margaret Dunn	297	376	26.6%	431	235	-45.5%	229	0	-100.0%	957	611	-36.2%	2774	5290	90.7%
Southfields	4052	8728	115.4%	5218	7913	51.6%	2770	5733	107.0%	12040	22374	85.8%	18677	86286	362.0%
Total	7586	15819	108.5%	9932	14881	49.8%	5179	11288	118.0%	22697	41988	85.0%	48383	151600	213.3%

Virtual Branch Use - Q4

	October			November			December			Q4 Total			YTD		
	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change
Website Usage															
Page views	23,874	28,109	186.6%	26,873	25,198	-6.2%	64,942	19,847	-69.4%	115,689	73,154	-36.8%	367,087	318,462	-13.2%
Users	6,301	7,432	17.9%	6,367	6,365	0.0%	8,021	5,322	-33.6%	20,689	19,119	-7.6%	77,965	78,457	0.6%
Catalogue Usage															
Page views	51,451	68,419	33.0%	49,696	62,856	26.5%	56,365	51,091	-9.4%	157,512	113,947	-27.7%	674,311	647,973	-3.9%
Sessions	8,298	9,679	16.6%	8,080	9,315	15.3%	8,414	8,525	1.3%	24,792	27,519	11.0%	103,688	102,810	-0.8%

Note: Catogue Usage were unavailable for Q4 2021. Analytics for the newly launched catalogue were collected as of Q1 2022.

Technology Use by Branch - Q4

Workstations

	October			November			December			Q4 Total			YTD Total		
	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change
Albion Bolton	52	432	730.8%	0	394	-	0	341	-	52	1167	2144.2%	226	2442	980.5%
Alton	61	62	1.6%	91	60	-34.1%	59	37	-37.3%	211	159	-24.6%	393	739	88.0%
Caledon East	85	95	11.8%	47	95	102.1%	40	67	67.5%	172	257	49.4%	282	871	208.9%
Caledon Village	29	35	20.7%	25	67	168.0%	8	53	562.5%	62	155	150.0%	140	400	185.7%
Inglewood	25	16	-36.0%	13	26	100.0%	0	25	-	38	67	76.3%	142	184	29.6%
Margaret Dunn	42	37	-11.9%	55	31	-43.6%	49	0	-100.0%	146	68	-53.4%	268	541	101.9%
Southfields	215	501	133.0%	273	485	77.7%	228	414	81.6%	716	1400	95.5%	1059	4863	359.2%
Total	294	677	130.3%	231	673	191.3%	156	523	235.3%	1397	3273	134.3%	1451	5177	256.8%

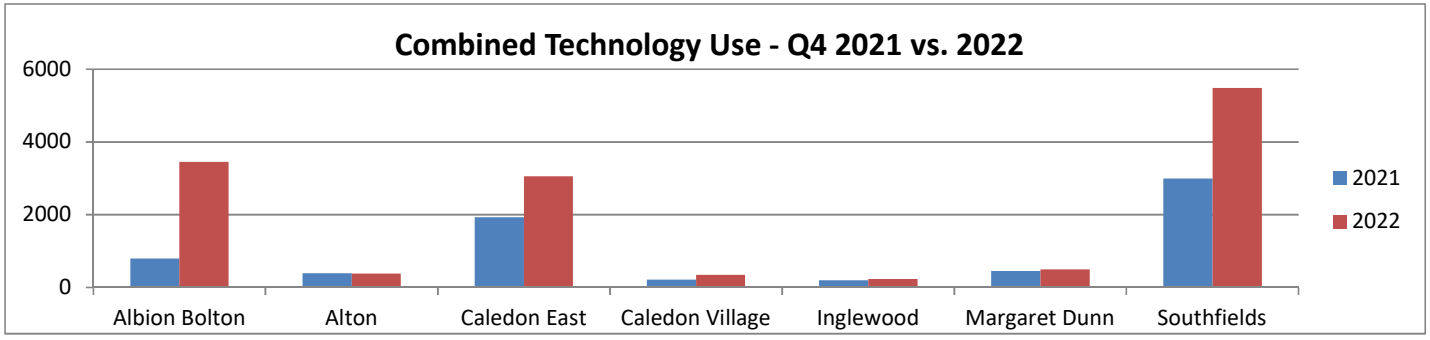
Wireless Network

	October			November			December			Q4 Total			YTD Total		
	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change
Albion Bolton	208	760	265.4%	209	849	306.2%	201	670	233.3%	618	2279	268.8%	1629	5651	246.9%
Alton	82	103	25.6%	58	71	22.4%	47	51	8.5%	187	225	20.3%	943	1112	17.9%
Caledon East	600	845	40.8%	654	993	51.8%	507	965	90.3%	1761	2803	59.2%	3180	7897	148.3%
Caledon Village	51	84	64.7%	65	66	1.5%	39	45	15.4%	155	195	25.8%	604	833	37.9%
Inglewood	80	99	23.8%	57	34	-40.4%	29	34	17.2%	166	167	0.6%	935	760	-18.7%
Margaret Dunn	102	133	30.4%	114	116	1.8%	97	180	85.6%	313	429	37.1%	1111	1768	59.1%
Southfields	731	1544	111.2%	834	1415	69.7%	680	1127	65.7%	2245	4086	82.0%	4672	14386	207.9%
Total	1123	2024	80.2%	1157	2129	84.0%	920	1945	111.4%	5445	10184	87.0%	13074	32407	147.9%

Note: 2021 Wireless data for Q4 could not be retrieved.

ChromeBooks

	October			November			December			Q4 Total			YTD Total		
	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change
Albion Bolton	0	4	-	54	5	-90.7%	74	0	-100.0%	128	9	-93.0%	138	393	184.8%
Southfields	24	12	-50.0%	9	12	33.3%	5	8	60.0%	38	32	-15.8%	50	173	246.0%
Total	24	16	-33.3%	63	17	-73.0%	79	8	-89.9%	166	41	184.8%	188	566	201.1%



Digital Resource and eBook Usage - Q4

	October			November			December			Q4 Total			YTD Total		
	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change
Digital Items Borrowed															
Overdrive-eBooks	3154	3104	-1.6%	3045	3057	0.4%	3142	3011	-4.2%	9341	9172	-1.8%	41276	38234	-7.4%
Overdrive - eAudio	1473	1507	2.3%	1370	1559	13.8%	1286	1476	14.8%	4129	4542	10.0%	16242	17088	5.2%
Overdrive - Magazines	638	598	-6.3%	536	546	1.9%	571	396	-30.6%	1745	1540	-11.7%	5823	6744	15.8%
Overdrive - Other	6	0	-100.0%	4	0	-100.0%	5	0	-	15	0	-100.0%	26	6	-76.9%
Hoopla - eBooks	699	802	14.7%	779	846	8.6%	754	828	9.8%	2232	2476	10.9%	9618	9323	-3.1%
Hoopla - eAudio	795	902	13.5%	771	964	25.0%	787	901	14.5%	2353	2767	17.6%	9314	10323	10.8%
Hoopla - Video	373	410	9.9%	361	382	5.8%	372	389	4.6%	1106	1181	6.8%	5085	5090	0.1%
Hoopla - Music	89	80	-10.1%	94	104	10.6%	103	123	19.4%	286	307	7.3%	1193	1036	-13.2%
Kanopy	213	200	-6.1%	190	249	31.1%	202	266	31.7%	605	715	18.2%	2663	2175	-18.3%
RBDigital Magazines (Zinio) *	0	0	-	0	0	-	0	0	-	0	0	-	116	0	-100.0%
Flipster Magazines	3	5	66.7%	14	1	-92.9%	19	7	-63.2%	36	13	-63.9%	215	115	-46.5%
Total Borrowed	7443	7608	2.2%	7164	7708	7.6%	7241	7397	2.2%	21848	22713	4.0%	91571	90134	-1.6%

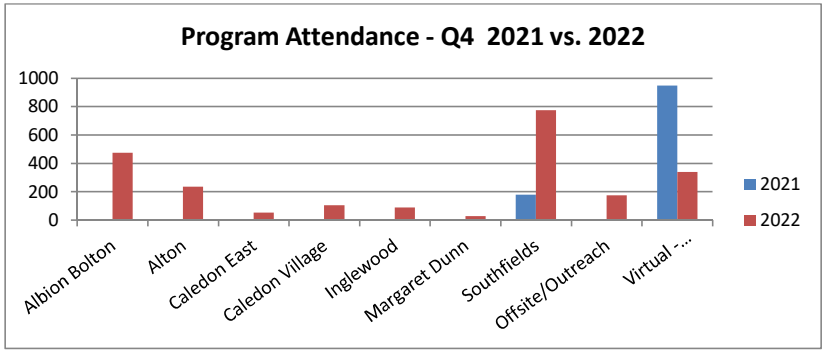
*RBDigital (Zinio) merged with Overdrive in February 2021 - The number of magazines borrowed are now reflected under Overdrive - Magazines.

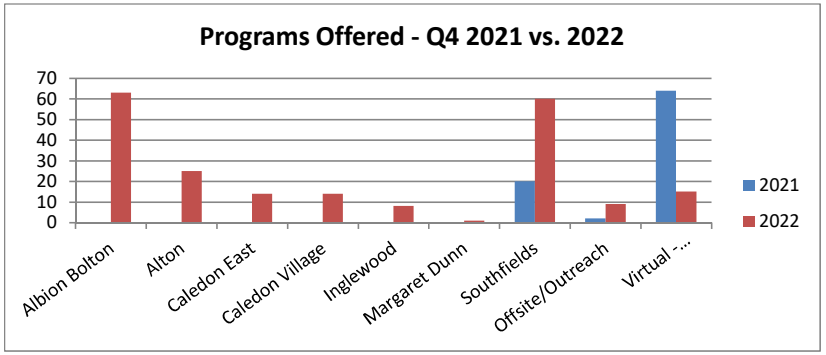
Digital Resources Accessed															
PressReader (formerly Press Display)	1574	1434	-8.9%	1652	1845	11.7%	1613	1553	-3.7%	4839	4832	-0.1%	16392	18111	10.5%
Ancestry	366	265	-27.6%	422	500	18.5%	737	82	-88.9%	1525	847	-44.5%	9234	5316	-42.4%
Tumble Books Premier	138	10	-92.8%	608	26	-95.7%	137	90	-34.3%	883	126	-85.7%	2467	985	-60.1%
Consumer Reports	384	140	-63.5%	327	292	-10.7%	292	332	13.7%	1003	764	-23.8%	2553	2741	7.4%
World Book	70	4	-94.3%	14	6	-57.1%	7	0	-100.0%	91	10	-89.0%	216	112	-48.1%
Gale Databases	9	29	222.2%	21	56	166.7%	9	70	677.8%	39	155	297.4%	301	346	15.0%
Novelist	195	109	-44.1%	750	177	-76.4%	191	83	-56.5%	1136	369	-67.5%	4347	2474	-43.1%
EBSCO	101	211	108.9%	219	123	-43.8%	82	117	42.7%	402	451	12.2%	1068	1332	24.7%
Gale Courses	7	31	342.9%	37	21	-43.2%	12	10	-16.7%	56	62	10.7%	307	205	-33.2%
Mango Languages	35	67	91.4%	23	98	326.1%	65	54	-16.9%	123	219	78.0%	610	1146	87.9%
New York Times ***	0	0	-	0	0	-	0	0	-	0	0	-	72	0	-100.0%
Cypress Resume ***	0	0	-	1	0	-100.0%	3	0	-100.0%	4	0	-100.0%	26	9	-65.4%
Reference Canada/InfoCanada***	0	0	-	0	0	-	0	0	-	0	0	-	4	0	-100.0%
Creative Bug	11	14	27.3%	16	7	-56.3%	15	13	-13.3%	42	34	-19.0%	188	129	-31.4%
Niche Academy	271	318	17.3%	255	579	127.1%	427	311	-27.2%	953	1208	26.8%	3727	5234	40.4%
Road to the IELTS	83	198	138.6%	299	250	-16.4%	254	416	63.8%	636	864	35.8%	698	4387	528.5%
Brainfuse *	136	55	-59.6%	69	24	-65.2%	48	13	-72.9%	253	92	-63.6%	772	779	0.9%
LinkedIn *	8	17	112.5%	16	24	50.0%	8	18	125.0%	32	59	-	111	170	53.2%
LOTE **	0	0	-	0	5	-	0	12	-	0	17	-	0	130	-
Toronto Historical Newspaper **	0	52	-	0	346	-	0	31	-	0	429	-	0	753	-
Total Accessed	3388	2954	-12.8%	4729	4379	-7.4%	3900	3205	-17.8%	12017	10538	-12.3%	43093	44359	2.9%
Total Usage	10831	10562	-2.5%	11893	12087	1.6%	11141	10602	-4.8%	33865	33251	-1.8%	134664	134493	-0.1%

* New in 2021 ** New in 2022 *** discontinued subscription

Programming by Branch - Q4

	October			November			December			Q4 Total			YTD		
	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change
Program Attendance															
Albion Bolton	0	277	-	0	150	-	0	46	-	0	473	-	0	795	-
Alton	0	87	-	0	77	-	0	70	-	0	234	-	0	689	-
Caledon East	0	27	-	0	24	-	0	0	-	0	51	-	0	225	-
Caledon Village	0	70	-	0	10	-	0	24	-	0	104	-	0	213	-
Inglewood	0	31	-	0	48	-	0	8	-	0	87	-	0	140	-
Margaret Dunn	0	27	-	0	0	-	0	0	-	0	27	-	0	66	-
Southfields	79	381	-	30	243	710.0%	69	150	117.4%	178	774	334.8%	234	2062	781.2%
Offsite/Outreach	0	120	-	0	43	-	7	10	42.9%	7	173	2371.4%	62	2366	3716.1%
Virtual - Live/Recorded	254	126	-50.4%	372	182	-51.1%	321	30	-90.7%	947	338	-64.3%	6286	2958	-52.9%
Total	333	1146	244.1%	30	777	2490.0%	76	338	344.7%	1132	2261	99.7%	6582	9514	44.5%
Contests & Activities	147	0	-	0	170	-	32	101	215.6%	179	271	51.4%	3359	2294	-31.7%
Grand Total	480	1146	138.8%	30	947	3056.7%	108	439	306.5%	1311	2532	93.1%	9941	11808	18.8%
															Number of Programs
Albion Bolton	0	20	-	0	24	-	0	19	-	0	63	-	0	97	-
Alton	0	10	-	0	9	-	0	6	-	0	25	-	0	46	-
Caledon East	0	6	-	0	7	-	0	1	-	0	14	-	0	40	-
Caledon Village	0	10	-	0	2	-	0	2	-	0	14	-	0	25	-
Inglewood	0	4	-	0	2	-	0	2	-	0	8	-	0	14	-
Margaret Dunn	0	1	-	0	0	-	0	0	-	0	1	-	0	5	-
Southfields	8	27	237.5%	8	26	225.0%	4	7	75.0%	20	60	200.0%	24	168	600.0%
Offsite/Outreach	1	5	400.0%	0	3	-	1	1	0.0%	2	9	350.0%	3	31	933.3%
Virtual - Live/Recorded	25	7	-72.0%	30	6	-80.0%	9	2	-77.8%	64	15	-76.6%	475	153	-67.8%
Total	34	90	164.7%	38	79	107.9%	14	40	185.7%	86	209	143.0%	502	579	15.3%
Contests & Activities	6	0	-100.0%	0	6	-	1	6	500.0%	7	12	71.4%	22	52	136.4%
Grand Total	40	90	125.0%	38	85	123.7%	15	46	206.7%	93	221	137.6%	524	631	20.4%
Volunteer Hours	52	12	-76.9%	16	60	275.0%	49	61	24.5%	117	133	13.7%	390	343	-12.1%





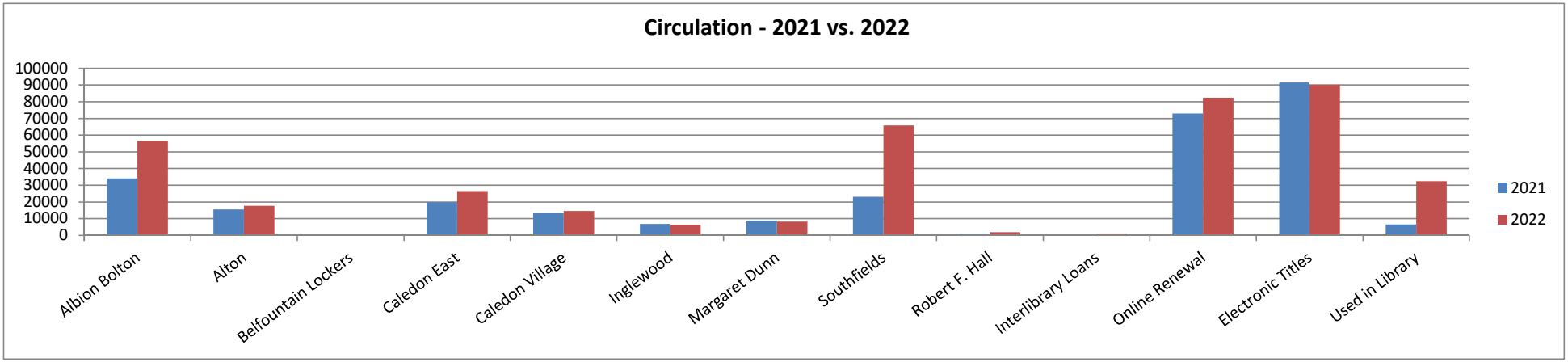
Quarterly Performance Measures and Statistics

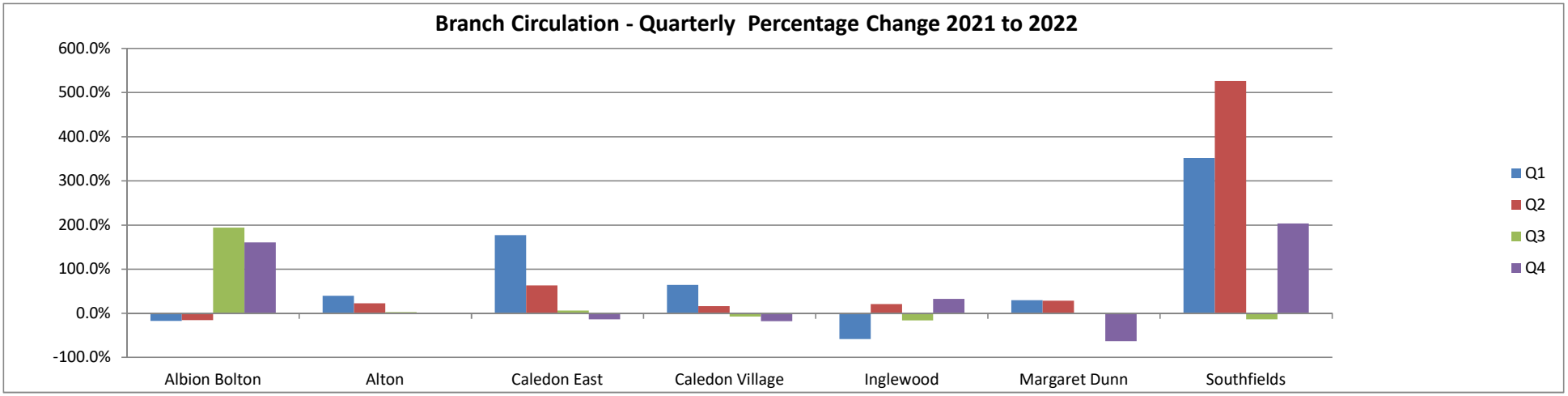
Year End 2022

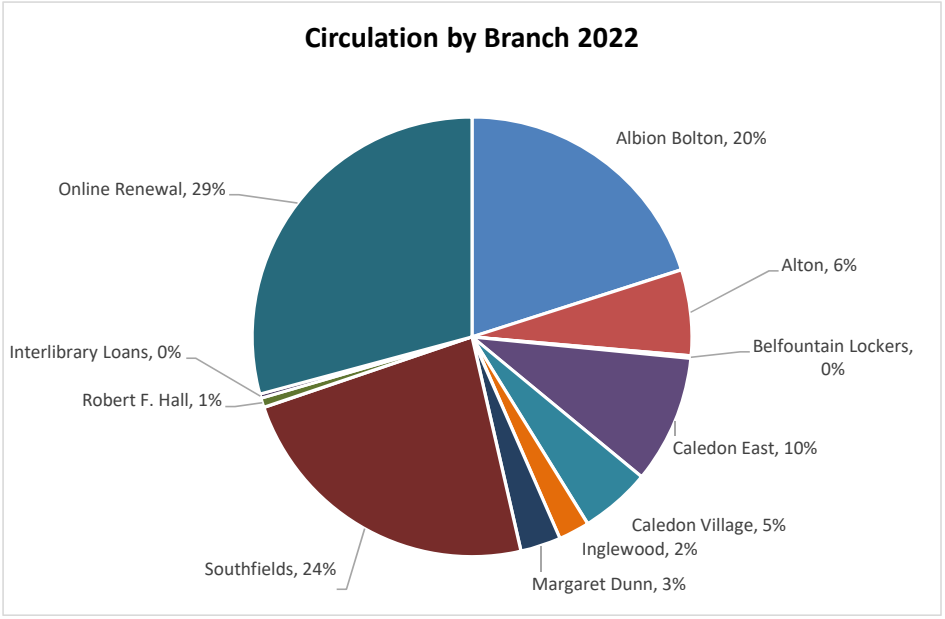
Circulation by Branch

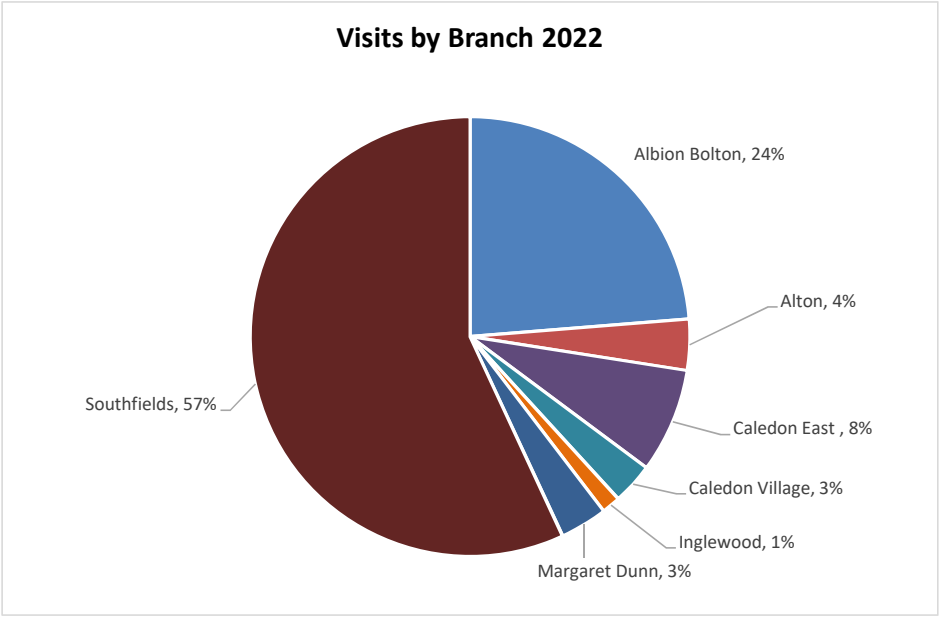
	Q1			Q2			Q3			Q4			Annual		
	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change
Albion Bolton	9418	7753	-17.7%	10340	8718	-15.7%	7540	22170	194.0%	6915	18003	160.3%	34213	56644	65.6%
Alton	3371	4705	39.6%	3290	4038	22.7%	4649	4751	2.2%	4360	4338	-0.5%	15670	17832	13.8%
Belfountain Lockers	9	140	1455.6%	20	106	430.0%	84	79	-6.0%	105	167	59.0%	218	492	125.7%
Caledon East	2560	7091	177.0%	4167	6783	62.8%	7011	7429	6.0%	6148	5282	-14.1%	19886	26585	33.7%
Caledon Village	2727	4480	64.3%	3210	3717	15.8%	3708	3440	-7.2%	3724	3057	-17.9%	13369	14694	9.9%
Inglewood	1676	697	-58.4%	1628	1967	20.8%	2288	1909	-16.6%	1390	1837	32.2%	6982	6410	-8.2%
Margaret Dunn	1869	2421	29.5%	1760	2263	28.6%	2723	2731	0.3%	2615	965	-63.1%	8967	8380	-6.5%
Southfields	2752	12432	351.7%	2894	18125	526.3%	12522	20105	-13.7%	5051	15320	203.3%	23219	65982	184.2%
Robert F. Hall	5	550	10900.0%	0	619	-	134	176	31.3%	690	622	-9.9%	829	1967	137.3%
Interlibrary Loans	0	284	-	0	239	-	0	79	-	247	258	4.5%	247	860	248.2%
Online Renewal	16409	18608	13.4%	15478	18278	18.1%	20132	24434	21.4%	20956	21091	0.6%	72975	82411	12.9%
Sub-Total	40796	59161	45.0%	42787	64853	51.6%	60791	87303	43.6%	52201	70940	35.9%	196575	282257	43.6%
Electronic Titles	23904	22294	-6.7%	23771	21915	-7.8%	22048	23262	5.5%	21848	22713	4.0%	91571	90184	-1.5%
	64700	81455	25.9%	66558	86768	30.4%	82839	110565	33.5%	74049	93653	26.5%	288146	372441	29.3%
Used in Library	4	5085	127025.0%	1	6674	667300.0%	2868	13452	369.0%	3750	7249	93.3%	6623	32460	390.1%
Total	64704	86540	33.7%	66559	93442	40.4%	85707	124017	44.7%	77799	100902	29.7%	294769	404901	37.4%

Note: Various branches were closed due to construction for periods throughout the year. Hours of operation at rural branches were also reduced due to staff shortages in Q3-Q4 2022.



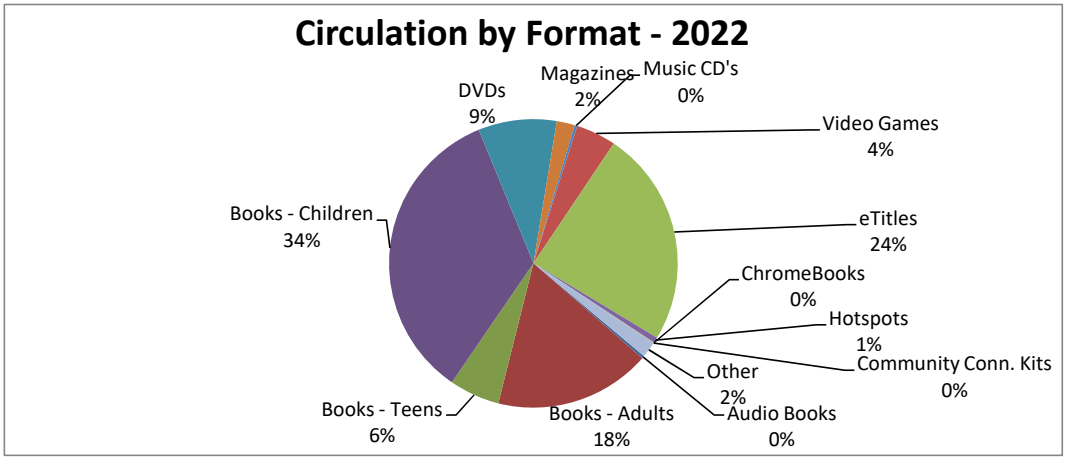

Branch Circulation - Quarterly Percentage Change 2021 to 2022
600.0%
500.0%
400.0%
300.0%
200.0%
100.0%
0.0%
-100.0%
Albion Bolton
Alton
Caledon East
Caledon Village
Inglewood
Margaret Dunn
Southfields
Q1
Q2
Q3
Q4


Circulation by Branch 2022
Albion Bolton, 20%
Alton, 6%
Belfountain Lockers, 0%
Caledon East, 10%
Caledon Village, 5%
Inglewood, 2%
Margaret Dunn, 3%
Southfields, 24%
Robert F. Hall, 1%
Interlibrary Loans, 0%
Online Renewal, 29%


Visits by Branch 2022
Albion Bolton, 24%
Alton, 4%
Caledon East , 8%
Caledon Village, 3%
Inglewood, 1%
Margaret Dunn, 3%
Southfields, 57%

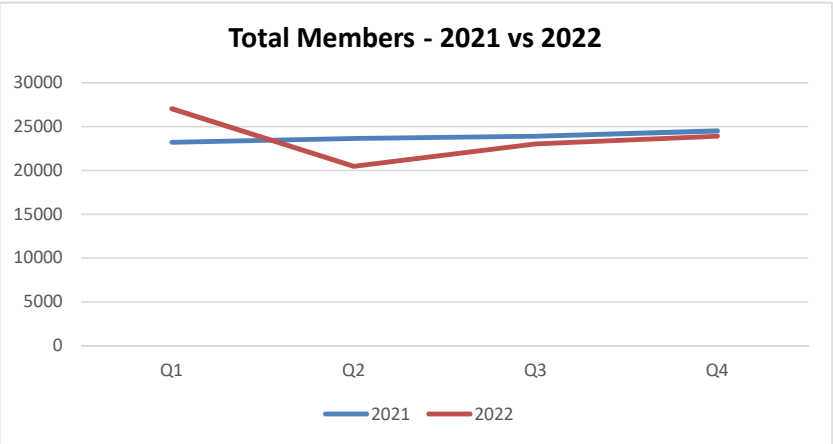
Circulation by Format

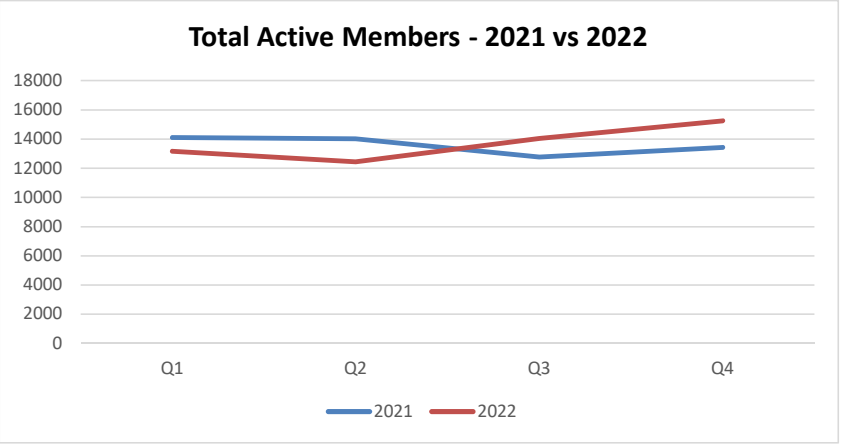
	Q1			Q2			Q3			Q4			Annual		
	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change
Audio Books	318	264	-17.0%	275	265	-3.6%	386	277	-28.2%	463	298	-35.6%	1442	1104	-23.4%
Books - Adults	12458	14501	16.4%	12499	14923	19.4%	15595	18928	21.4%	14858	16822	13.2%	55410	65174	17.6%
Books - Teens	2262	4172	84.4%	2579	4898	89.9%	4336	6813	57.1%	4787	5235	9.4%	13964	21118	51.2%
Books - Children	15358	25616	66.8%	16507	29182	76.8%	26125	40717	55.9%	26970	32064	18.9%	84960	127579	50.2%
DVDs	6753	7653	13.3%	6613	7425	12.3%	7988	9555	19.6%	7764	8007	3.1%	29118	32640	12.1%
Magazines	762	1607	110.9%	1245	1740	39.8%	1963	2191	11.6%	1760	2041	16.0%	5730	7579	32.3%
Music CD's	150	196	30.7%	201	249	23.9%	226	338	49.6%	184	353	91.8%	761	1136	49.3%
Video Games	1424	3132	119.9%	1351	3532	161.4%	2419	5852	141.9%	3222	4209	30.6%	8416	16725	98.7%
eTitles	23904	22294	-6.7%	23771	21915	-7.8%	22048	23262	5.5%	21848	22713	4.0%	91571	90184	-1.5%
Hotspots	512	563	10.0%	519	597	15.0%	529	552	4.3%	556	557	0.2%	2116	2269	7.2%
Chromebooks	10	35	250.0%	0	52	-	12	81	575.0%	38	41	7.9%	60	209	248.3%
Community Conn. Kits	5	27	440.0%	8	40	400.0%	5	24	380.0%	6	20	233.3%	24	111	362.5%
Other	784	1395	77.9%	990	1950	97.0%	1207	1975	63.6%	977	1293	32.3%	3958	6613	67.1%
Total	64700	81455	25.9%	66558	86768	30.4%	82839	110565	33.5%	83433	93653	12.2%	297530	372441	25.2%



Library Activity

	Q1			Q2			Q3			Q4			Annual		
	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change
New Members Added	575	795	38.3%	421	1075	155.3%	298	1652	454.4%	622	945	51.9%	1916	4467	133.1%
Total Members	23218	27037	16.4%	23642	20470	-13.4%	23921	23021	-3.8%	24497	23918	-2.4%	24497	23918	-2.4%
Total Active Members	14095	13171	-6.6%	14015	12437	-11.3%	12760	14038	10.0%	13427	15247	13.6%	13427	15247	13.6%
Reference Queries	1558	405	-74.0%	172	662	284.9%	207	568	174.4%	350	493	40.9%	2287	2128	-7.0%
Holds Placed	12985	18808	44.8%	4674	16356	249.9%	19401	17541	-9.6%	18150	14932	-17.7%	55210	67637	22.5%
New Materials Added	7668	5976	-22.1%	8303	4201	-49.4%	33208	5230	-84.3%	7419	6030	-18.7%	56598	21437	-62.1%





Visits by Branch

	Q1			Q2			Q3			Q4			Total		
	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change
Albion Bolton	2668	3182	19.3%	2875	4470	55.5%	2553	14867	482.3%	3198	13431	320.0%	11294	35950	218.3%
Alton	650	1038	59.7%	672	1348	100.6%	951	1847	94.2%	1207	1465	21.4%	3480	5698	63.7%
Caledon East	771	2822	266.0%	927	2978	221.3%	1475	3412	131.3%	3624	2470	-31.8%	6797	11682	71.9%
Caledon Village	817	1121	37.2%	664	1334	100.9%	922	1199	30.0%	1174	964	-17.9%	3577	4618	29.1%
Inglewood	358	147	-58.9%	367	603	64.3%	562	653	16.2%	497	673	35.4%	1784	2076	16.4%
Margaret Dunn	502	838	66.9%	464	2487	436.0%	851	1354	59.1%	957	611	-36.2%	2774	5290	90.7%
Southfields	484	10223	2012.2%	609	24244	3881.0%	5544	29445	431.1%	12040	22374	85.8%	18677	86286	362.0%
Total	6250	19371	209.9%	6578	37464	469.5%	12858	52777	310.5%	22697	41988	85.0%	48383	151600	213.3%

Virtual Branch Use

	Q1			Q2			Q3			Q4			Total		
	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change
Website Usage															
Page views	76,473	76,045	-0.6%	76,473	78,234	2.3%	98,452	91,029	-7.5%	115,689	73,154	-36.8%	367,087	318,462	-13.2%
Users	17,246	18,253	5.8%	17,207	19,521	13.4%	22,823	21,564	-5.5%	20,689	19,119	-7.6%	77,965	78,457	0.6%
Catalogue Usage															
Page views	184,388	112,041	-39.2%	173,708	198,972	14.5%	158,703	223,013	40.5%	157,512	113,947	-27.7%	674,311	647,973	-3.9%
Sessions	27,837	21,256	-23.6%	25,987	24,690	-5.0%	25,072	29,345	17.0%	24,792	27,519	11.0%	103,688	102,810	-0.8%

Technology Use by Branch - Annual

Workstations

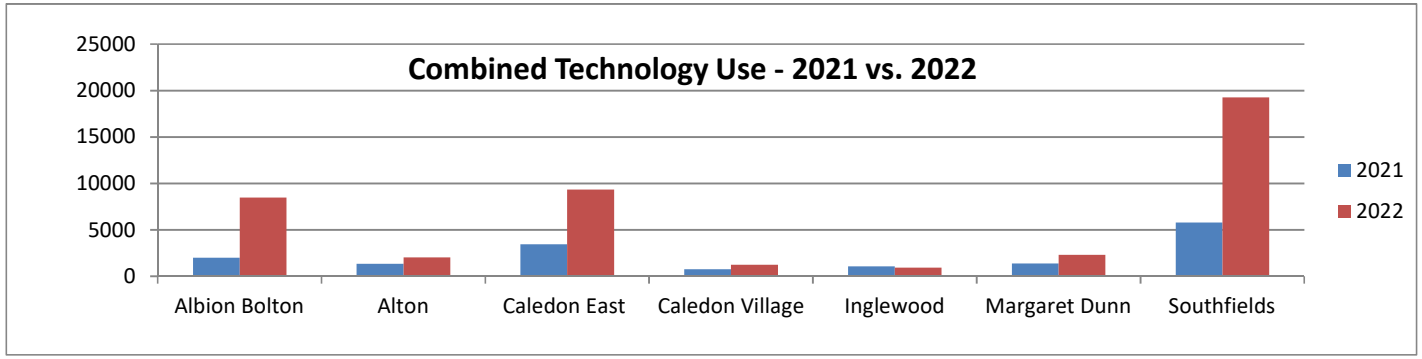
	Q1			Q2			Q3			Q4			Annual		
	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change
Albion Bolton	95	0	-100.0%	27	204	655.6%	52	1071	1959.6%	52	1167	2144.2%	226	2442	980.5%
Alton	16	180	1025.0%	7	172	2357.1%	159	228	43.4%	211	159	-24.6%	393	739	88.0%
Caledon East	19	154	710.5%	3	170	5566.7%	88	290	229.5%	172	257	49.4%	282	871	208.9%
Caledon Village	12	41	241.7%	17	72	323.5%	49	132	169.4%	62	155	150.0%	140	400	185.7%
Inglewood	18	31	72.2%	9	50	455.6%	77	36	-53.2%	38	67	76.3%	142	184	29.6%
Margaret Dunn	20	75	275.0%	14	144	928.6%	88	254	188.6%	146	68	-53.4%	268	541	101.9%
Southfields	17	670	3841.2%	7	1232	17500.0%	319	1561	389.3%	716	1400	95.5%	1059	4863	359.2%
Total	180	481	167.2%	77	812	954.5%	513	2011	292.0%	681	1873	275.0%	1451	5177	256.8%

Wireless Network

	Q1			Q2			Q3			Q4			Annual		
	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change
Albion Bolton	268	672	150.7%	145	872	501.4%	598	1828	205.7%	618	2279	268.8%	1629	5651	246.9%
Alton	248	207	-16.5%	171	310	81.3%	337	370	9.8%	187	225	20.3%	943	1112	17.9%
Caledon East	419	1474	251.8%	215	2272	956.7%	785	1348	71.7%	1761	2803	59.2%	3180	7897	148.3%
Caledon Village	119	122	2.5%	82	256	212.2%	248	260	4.8%	155	195	25.8%	604	833	37.9%
Inglewood	306	120	-60.8%	190	226	18.9%	273	247	-9.5%	166	167	0.6%	935	760	-18.7%
Margaret Dunn	310	320	3.2%	151	510	237.7%	337	509	51.0%	313	429	37.1%	1111	1768	59.1%
Southfields	674	2035	201.9%	420	3968	844.8%	1333	4297	222.4%	2245	4086	82.0%	4672	14386	207.9%
Total	2344	4950	111.2%	1374	8414	512.4%	3911	8859	126.5%	5445	10184	87.0%	13074	32407	147.9%

ChromeBooks

	Q1			Q2			Q3			Q4			Annual		
	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change
Albion Bolton	10	180	1700.0%	0	191	-	0	13	-	128	9	-93.0%	138	393	184.8%
Southfields	0	35	-	0	38	-	12	68	466.7%	38	32	-15.8%	50	173	246.0%
Total	10	215	2050.0%	0	229	-	12	81	575.0%	22	525	2286.4%	188	566	201.1%



Digital Resource and eBook Usage - Annual

	Q1			Q2			Q3			Q4			Annual		
	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change
Digital Items Borrowed															
Overdrive-eBooks	10756	9714	-9.7%	11061	9366	-15.3%	10118	9982	-1.3%	9341	9172	-1.8%	41276	38234	-7.4%
Overdrive - eAudio	4008	3847	-4.0%	4021	4118	2.4%	4084	4581	12.2%	4129	4542	10.0%	16242	17088	5.2%
Overdrive - Magazines	1128	2007	77.9%	1483	1628	9.8%	1467	1569	7.0%	1745	1540	-11.7%	5823	6744	15.8%
Overdrive - Other	7	2	-71.4%	1	2	100.0%	3	2	-33.3%	15	0	-100.0%	26	6	-76.9%
Hoopla - eBooks	2775	2265	-18.4%	2521	2296	-8.9%	2090	2286	9.4%	2232	2476	10.9%	9618	9323	-3.1%
Hoopla - eAudio	2352	2459	4.5%	2365	2520	6.6%	2244	2577	14.8%	2353	2767	17.6%	9314	10323	10.8%
Hoopla - Video	1525	1130	-25.9%	1338	1330	-0.6%	1116	1449	29.8%	1106	1181	6.8%	5085	5090	0.1%
Hoopla - Music	323	235	-27.2%	321	224	-30.2%	263	270	2.7%	286	307	7.3%	1193	1036	-13.2%
Kanopy	848	546	-35.6%	589	385	-34.6%	621	529	-14.8%	605	715	18.2%	2663	2175	-18.3%
RBDigital (Zinio) Magazines*	116	0	-100.0%	0	0	-	0	0	-	0	0	-	116	0	-100.0%
Flipster Magazines	66	39	-40.9%	71	46	-35.2%	42	17	-59.5%	36	13	-63.9%	215	115	-46.5%
Total Borrowed	23904	22244	-6.9%	23771	21915	-7.8%	22048	23262	5.5%	21848	22713	4.0%	91571	90134	-1.6%

*RBDigital (Zinio) merged with Overdrive in February 2021 - The number of magazines borrowed are now reflected under Overdrive - Magazines.

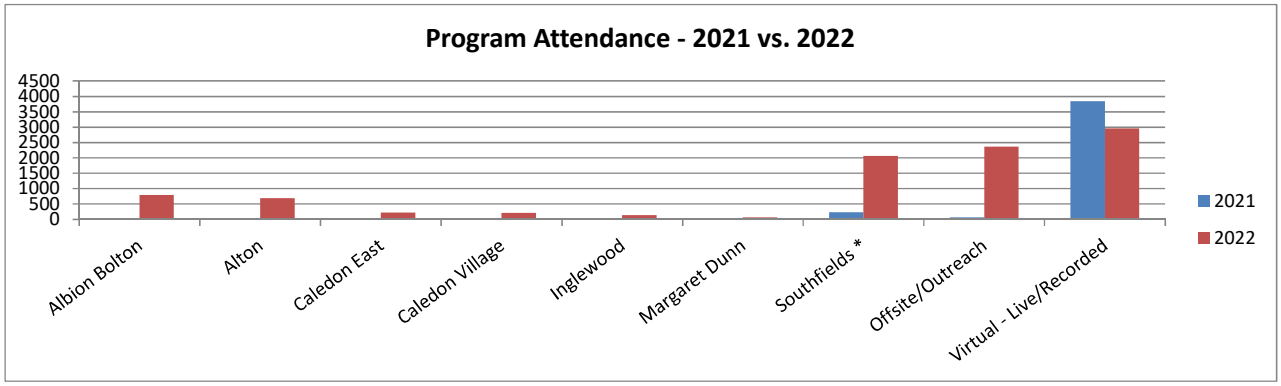
Digital Resources Accessed															
Press Display	4430	4648	4.9%	3139	4291	36.7%	3984	4340	8.9%	4839	4832	-0.1%	16392	18111	10.5%
Ancestry	3804	1476	-61.2%	2649	1078	-59.3%	1256	1915	52.5%	1525	847	-44.5%	9234	5316	-42.4%
Tumble Books Premier	751	589	-21.6%	576	198	-65.6%	257	72	-72.0%	883	126	-85.7%	2467	985	-60.1%
Consumer Reports	414	837	102.2%	463	440	-5.0%	673	700	4.0%	1003	764	-23.8%	2553	2741	7.4%
World Book	81	65	-19.8%	39	6	-84.6%	5	31	520.0%	91	10	-89.0%	216	112	-48.1%
Gale Databases	186	92	-50.5%	38	45	18.4%	38	54	42.1%	39	155	297.4%	301	346	15.0%
Novelist	1076	888	-17.5%	1431	678	-52.6%	704	539	-23.4%	1136	369	-67.5%	4347	2474	-43.1%
EBSCO	266	321	20.7%	213	296	39.0%	187	264	41.2%	402	451	12.2%	1068	1332	24.7%
Gale Courses	123	43	-65.0%	67	34	-49.3%	61	66	8.2%	56	62	10.7%	307	205	-33.2%
Mango Languages	199	298	49.7%	174	369	112.1%	114	260	128.1%	123	219	78.0%	610	1146	87.9%
New York Times ***	39	0	-100.0%	22	0	-100.0%	11	0	-100.0%	0	0	-	72	0	-100.0%
Cypress Resume ***	15	9	-40.0%	2	0	-100.0%	5	0	-100.0%	4	0	-100.0%	26	9	-65.4%
Reference Canada/InfoCanada***	2	0	-100.0%	2	0	-100.0%	0	0	-	0	0	-	4	0	-100.0%
Creative Bug	63	34	-46.0%	54	29	-46.3%	29	32	10.3%	42	34	-19.0%	188	129	-31.4%
Niche Academy	682	1887	176.7%	1294	1046	-19.2%	798	1093	37.0%	953	1208	26.8%	3727	5234	40.4%
Road to the IELTS	7	849	12028.6%	0	941	-	55	1733	3050.9%	636	864	35.8%	698	4387	528.5%
Brainfuse *	0	153	-	479	357	-25.5%	40	177	342.5%	253	92	-63.6%	772	779	0.9%
LinkedIn *	0	45	-	44	28	-36.4%	35	38	8.6%	32	59	84.4%	111	170	53.2%
LOTE **	0	75	-	0	14	-	0	24	-	0	17	-	0	130	-
Toronto Historical Newspaper **	0	103	-	0	58	-	0	163	-	0	429	-	0	753	-
Total Accessed	12138	12412	2.3%	10686	9908	-7.3%	8252	11501	39.4%	12017	10538	-12.3%	43093	44359	2.9%

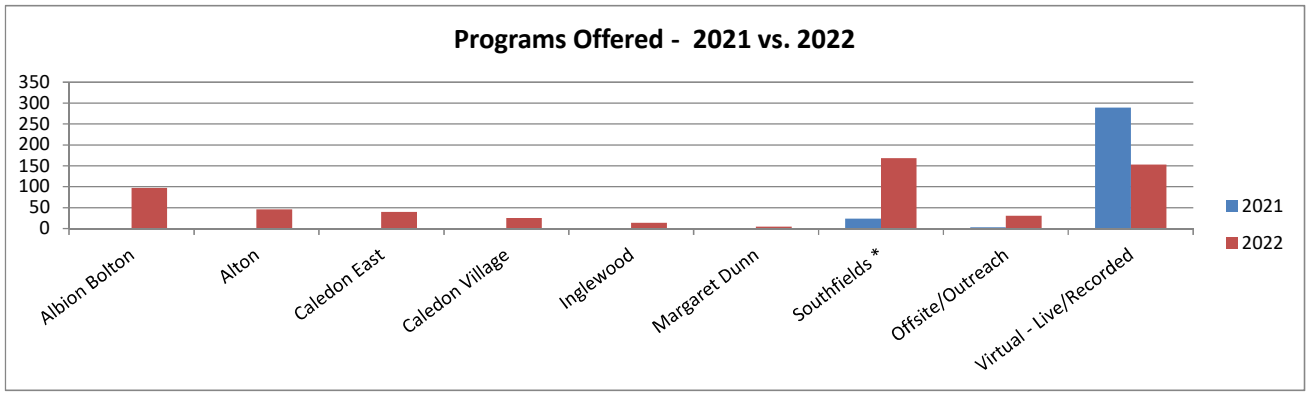
Total Usage	36042	34656	-3.8%	34457	31823	-7.6%	30300	34763	14.7%	33865	33251	-1.8%	134664	134493	-0.1%

* New in 2021 ** New in 2022 *** discontinued subscription

Programming by Branch - Annual

	Q1			Q2			Q3			Q4			Total		
	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change	2021	2022	% Change
Program Attendance															
Albion Bolton	0	0	-	0	0	-	0	322	-	0	473	-	0	795	-
Alton	0	0	-	0	77	-	0	378	-	0	234	-	0	689	-
Caledon East	0	13	-	0	49	-	0	112	-	0	51	-	0	225	-
Caledon Village	0	6	-	0	0	-	0	103	-	0	104	-	0	213	-
Inglewood	0	0	-	0	0	-	0	53	-	0	87	-	0	140	-
Margaret Dunn	0	14	-	0	0	-	0	25	-	0	27	-	0	66	-
Southfields *	0	141	-	0	756	-	56	391	598.2%	178	774	334.8%	234	2062	781.2%
Offsite/Outreach	0	0	-	0	922	-	55	1271	2210.9%	7	173	2371.4%	62	2366	3716.1%
Virtual - Live/Recorde	0	1155	-	1910	836	-56.2%	980	629	-35.8%	947	338	-64.3%	3837	2958	-22.9%
Total	0	1329	-	1910	2640	38.2%	1091	3284	201.0%	1132	2261	99.7%	4133	9514	130.2%
Contests & Activities	28	257	817.9%	2749	407	-85.2%	403	1359	237.2%	179	271	51.4%	3359	2294	-31.7%
Grand Total	28	1586	5564.3%	4659	3047	-34.6%	1494	4643	210.8%	1311	2532	93.1%	7492	11808	57.6%
Number of Programs															
Albion Bolton	0	0	-	0	0	-	0	34	-	0	63	-	0	97	-
Alton	0	0	-	0	4	-	0	17	-	0	25	-	0	46	-
Caledon East	0	1	-	0	18	-	0	7	-	0	14	-	0	40	-
Caledon Village	0	1	-	0	0	-	0	10	-	0	14	-	0	25	-
Inglewood	0	0	-	0	0	-	0	6	-	0	8	-	0	14	-
Margaret Dunn	0	2	-	0	0	-	0	2	-	0	1	-	0	5	-
Southfields *	0	12	-	0	66	-	4	30	650.0%	20	60	200.0%	24	168	600.0%
Offsite/Outreach	0	0	-	0	17	-	1	5	400.0%	2	9	350.0%	3	31	933.3%
Virtual - Live/Recorde	0	75	-	142	50	-64.8%	83	13	-84.3%	64	15	-76.6%	289	153	-47.1%
Total	0	91	-	142	155	9.2%	88	124	40.9%	86	209	143.0%	316	579	83.2%
Contests & Activities (	0	9	-	0	13	-	14	18	28.6%	7	12	71.4%	21	52	147.6%
Grand Total	0	100	-	142	168	18.3%	102	142	39.2%	93	221	137.6%	337	631	87.2%




Programs Offered - 2021 vs. 2022
350
300
250
200
150
100
50
0
Albion Bolton
Alton
Caledon East
Caledon Village
Inglewood
Margaret Dunn
Southfields *
Offsite/Outreach
Virtual - Live/Recorded
2021
2022

Attachment 9-C

Date: January 16, 2023

To: Caledon Public Library Board

From: Colleen Lipp, CEO and Chief Librarian

Subject: Strategic Action 2022 Year-End Status Report

Recommendation:

That the Caledon Public Library Board review the attached Strategic Action 2022 Year-End Status Report

Background

A comprehensive list of planned actions was adopted in support of the Library's 2021-2024 strategic plan, Building the Bridge to Possibilities. Actions, timelines and performance indicators were identified within each goal and objective. Attached as Appendix A, this plan documents the work undertaken to address these actions over the past year.

The end of 2022 marks the half-way point of this four-year plan and much has been accomplished to date – particularly as related to facility improvement projects and a return to pre-pandemic services. However, there are also a number of actions planned for 2022 that remain unaddressed or only partially completed. This is in large part due to the ambitiousness of the plan coupled with staff vacancies and shortages over the course of the year. That being said, the staff and Board should be commended for the progress that has been made to date and the work done to position us to undertake the many actions planned for 2023.

This action plan is complemented by an Assessment and Evaluation Plan that confirms specific indicators and targets by which to measure the Library's success in realizing the objectives of our strategic plan. 2022 assessment and evaluation measures will be shared with the Board in the Spring of 2023.

Financial Implication

None.

Recommended Motion

That the Caledon Public Library Board receive the Strategic Action 2021 Year-End Status Report

Priority: Grow and Innovate

Objective	Planned Action	Necessary Supports/ Prerequisites	Success Indicators	Responsibility	Timeline		2021 Year End Status	2022 Year End Status
	What is going to be done?	*What needs to be in place for this action to happen? [staff, budget, space, technology, related actions?]*	*Who does this benefit and/or how will we measure it?*	*Who is going to do it?*	*Planned Start*	*Expected Completion*		
Exploring new opportunities and creative solutions for expanding services and spaces	Begin planning for new branches and services in support of a quickly growing Caledon	• Population forecasts • Development charge funds • Town Official Plan	• Increase use of library service • Provision of service delivery in newly developed areas in Caledon	Management Team	Q4 2022	Ongoing		Primary focus of the Comprehensive Growth Plan
	Modernize the Albion-Bolton Branch	• Sufficient funding, Council Support	• More efficient and effective use of available space • Increased # of branch visits	Management and Staff	Q2 - 2021	Q1 – 2022	The renovation is well underway, supply chain has presented some problems, aiming for completion April 2022	This project was completed and the branch re-opened to the public on June 20, 2022
	Design and equip the Reading Garden at the Southfields Village Branch as a destination and program space	• Funding/sponsorship for required equipment and furniture; collaborative grants and partnerships	• Increased visibility and awareness of branch • Increased # of branch visits • # of programs hosted in reading garden	Management and Staff	Q4 - 2021	Q3 - 2022	Project is currently on track. Shade sail vendor has been confirmed and most furniture has been ordered.	This project is complete, marked by its official opening on June 21, 2022.

Undertake a master plan to reflect the impact of updated population forecasts on future spaces and services.	• **Approval of capital project to fund master plan** • **Partial funding from Development Charges**	• **Receipt of a completed plan that will inform future development and growth** • **A process that fully engages the Board, staff and key stakeholders**	**Board and CEO/ Chief Librarian**	**Q1 2022**	**Q4 2022**	**Capital project approved as part of 2022 Budget**	**Rebranded as a Comprehensive Growth Plan, work was largely completed in 2022 – pending Board approval in January 2023**
Use the recommendations of the master plan to support further investment in library facilities	• **Completion of Master Plan**	• **Board and Council approval of proposed budget increases for new capital projects /investments**	**Board; CEO/Chief Librarian; and Finance Committee**	**Q3 2022**	**Ongoing**		
Utilize the master plan recommendations to inform services and staffing	• Funding for change to programming and services • Completed master plan	• Sufficient staff complement to meet strategic objectives and growth	Management Team	Q4 2022	Ongoing		
Explore opportunities for public-private partnerships in support of new facility development	• **Consideration of these opportunities within the scope of work of the master plan.**	• **Relationships with stakeholders who are positioned to move branch development forward.**	**Board and CEO/Chief Librarian**	**2022**	**Ongoing**	**The Advocacy and Fundraising Committee of the Board has approved a recommendation to seek sponsorship support for the recording studio in Valleywood**	**Staff continue to investigate options sponsorship of the MDV recording studio.**
Active participation within the Caledon Station engagement process	• **Seat at the table** • **Board participation**	• **Improved community understanding of potential for library spaces** • **Strengthen relationships with**	**Board and CEO/Chief Librarian**	**Q2 2021**	**Ongoing**	**Project planners hosted a dedicated meeting to engage the Library within the early planning process.**	

		the development community.					
Undertake an initial assessment of the Library's IT operations and network infrastructure		• Improved department effectiveness	Management Team	Q2 2021	Q3 2021	Assessment was completed and used to inform relevant 2022 budget proposals.	
Undertake a joint review of IT operations to identify service gaps and opportunities for shared service and recommendations for better aligning IT investments and network infrastructure.	• Approved capital project within 2022 budget • Engagement of Town Information Technology team	• Development of a Service Level Agreement- with clearly identified deliverables • Improved connectivity and network functionality	CEO/Chief Librarian and Manager, IT	Q1 2022	Q4 2022	Capital project approved as part of 2022 Budget.	Funded in 2022, though procurement was delayed due to staff vacancies in key roles.
Develop a workplan to implement the recommendations of the IT operational assessment, including improved backup and file management protocols, a disaster recovery plan, etc.	• Completed assessment • Staff capacity • Availability of managed services	• Detailed workplan and timeline • Improved network performance	Management and staff	Q4 2021	Ongoing	The start of this work has been delayed by the vacancy in the role of Manager, Information Technology	Plan is currently being devised. Already working on internal documentation of processes.
Develop an IT Steering Committee to ensure effective and informed IT policies and governance	• Staff availability • Terms of reference	• Improved integration of IT within all department operations	Management and staff	Q4 2021	Ongoing	The start of this work has been delayed by the vacancy in the role of Manager, Information Technology	Still in development. Delayed due to staff vacancies in key roles.
Explore opportunities for staff-less afterhours access to library branches or spaces	• Availability of funding and relevant technologies • Ability to integrate within existing spaces	• Provision of access to library service beyond regular operating hours.	Management Team	2023	2024		Reflected through the recommendations of the Comprehensive Growth Plan

Consider the implementations of technology for self-check and RFID on design of future buildings and renovations	• Ensure library staff participate when designing new facilities to make sure designers are made aware of required technologies and services.	• Ensuring the necessary technology services are included within designed facilities.	Management Team	2021	2024	Installation of electrical and data required to support self-check has been included in plans for Albion Bolton and Caledon East. Infrastructure already in place in Southfields Village.	Referenced with in the recommendations of the Comprehensive Growth Plan
Investigate the feasibility of non-RFID self-serve checkout options within some branches	Funding requirement for technology, facility setup and space	• Successful implementation of self-serve station • Staff focus on value added services rather than solely materials handling.	Management and staff	Q1 2024	ongoing		
Continue to develop and promote the CPL Mobile app		• Increased public use of mobile app • Increased use of app as a key communication and readers advisory tool	Management and staff	2021	2024	The Mobile App was used for COVID pre-screening for customers.	The Mobile App was updated in November 2022 and shared with staff – including the ability to customize to various languages. A marketing campaign is schedule for Q1 2023
Explore opportunities for expanding library services and spaces beyond the walls of the library. Possibilities include holds lockers, vending machines, book mobile and pop-up services.	• Inclusion within master plan scope of work.	• Increased awareness of library services • Increase in # of active memberships	Management Team	2023	2024		Questions have been posed to public to see their appetite for these services through the Comprehensive Growth Plan, pop-ups continue to happen at events.

	Investigate the inclusion of technology investments within the new Development Charge study.	• Eligibility within Development Charge Act • Sufficient DC funds, supported by historical service standards	• More informed MT with better understanding of DC and allocation of municipal funding for future consideration.	Management Team	Q1 2023	Q4 2023		
Develop maker, innovation and creativity spaces in partnership with the Town of Caledon, businesses, and community partners	Revitalize the Caledon East Branch, including the creation of a new makerspace, as part of an expanded Caledon East Community Complex	• Expanded hours of operation, transition to full service branch. • Sufficient operating budget	• Increased # of branch visits • Increased hours of operation • Increased # of active library members • Use of maker technologies and services	Management and staff	2022	2024	Initial design phase of this branch and maker space has been completed and early construction has begun.	Construction is scheduled for completion in 2023. A related budget request has been proposed as a means of ensuring adequate staffing and offering full service hours.
	Reimagine the Margaret Dunn Valleywood Branch as a learning, maker, and innovation lab.	• Completed procurement of General Contractor	• Increased # of branch visits • Increased # of active library members • Increased use of library services by local businesses • Use of maker technologies and services	Management and staff	Q4 - 2021	Q4 - 2022	A scope of work has been drafted as a means of informing the imminent release of an RFP to identify the preferred design-build contractor.	Construction is set to begin January 3.2023 with full completion slated for early spring.
	Become an active partner to the Town in repurposing the Downtown Bolton Fire Hall as a community hub	• Library staff expertise in maker tools and services	• Increased awareness of library services • # of programs	Management and staff	2021	Ongoing	CPL staff have been participating in monthly meetings with Town staff to discuss options and opportunities	A new position as proposed in the 2023 budget can be leveraged to deliver services at the Humber River Center innovation lab.

	Develop new and leverage existing partnerships with community organizations to facilitate or host technology-based programs	• Partnership technology	• # of new programs/ partnerships • # of program participants • Participant and partner feedback/ testimonials	Management and staff	Q1 – 2022	2024		Caledon Community Services, *Cyber-Seniors* program resumed in the fall of 2022.
	Introduce new maker technologies for self-directed and demonstration purposes at Bolton Branch	• Procurement of maker technologies • Staff training	• Use of maker technologies and services • Increased awareness of maker services	Management and staff	2022	2024		
	Integration of mobile maker technologies, both digital and analog, into program and service offerings at non-maker space branches or outreach events	• Procurement of maker technologies • Staff training	• Use of maker technologies and services • Increased awareness of maker services	Management and staff	2022	2024		Cricut and 3D printer programs have been offered at all branches. The Cricut and 3D printer have also been taken to community events.
Ensure the library has the staff capacity to meet the needs of a growing Caledon	**Include a review of staff structure and capacity within the proposed Master Plan**	• **Approval of capital project to fund master plan** • **Partial funding from Development Charges.**	• **Receipt of a completed plan that will inform future development and growth** • **A process that fully engages the Board, staff and key stakeholders.**	**Board and CEO/Chief Librarian**	**Q1 2022**	**Q4 2022**		**The drafted Comprehensive Growth Plan includes such a review and references related recommendations.**
	Use the recommendations of the master plan to support further investment in library staffing	• **Completion of Master Plan**	• **Board and Council approval of proposed budget increases – capital projects and new head count.** • # of new positions created	**Board; CEO/Chief Librarian; and Finance Committee**	**Q3 2022**	**ongoing**		

			• # staff/capita					
	Create a succession plan to support staff progression through the organization's structure and ensure business continuity	• Staff engagement • Revised core competencies	• % of staff who are promoted internally • % of staff who indicate an interest in pursuing a management position	Management Team	2022	2024		Some internal work has happened regarding this, with a new vision for Public Services and the Corporate Services Director has started at CPL.
	Expand and formalize the recruitment and onboarding training program	• Staff capacity	• Successful enrollment of new staff into the library system • Development of platform such as Niche Academy.	Management Team	2021	2024	The current onboarding and recruitment protocols have been reviewed and supporting documentation has been drafted.	
	Continue to leverage and develop committees and working groups to pilot projects	• Staff capacity	• Increased staff input and participation • Incorporating diverse opinions and exploration of new ideas	Management and staff	Q1 2021	Ongoing	Collection review committee formed; Cataloguing working group formed	Programming Working Group formed, Makerspace working group formed
	Invest in tools for improving staff collaboration and communication such as Slack, Teams, Hybrid programming.	• Required funding and budget; • Leveraging technology to support institutional needs	• Implementation of new virtual communication tools • Better communication between staff as well as external organizations	Management and staff	2023	Ongoing		Managers started using Teams, Planner. New meeting hardware has been ordered (meeting Owl) or is being planned.
Build a staff culture of personal development and accountability	Invest in the development of all staff to build the necessary knowledge, skills, and	• Results of TLC staff training survey	• Increased staff competency • Improved employee engagement	Management and staff	2021	Ongoing	Niche Academy is being leveraged to deliver and support staff training;	Training for staff is ongoing. As per the Growth Plan Staff Survey, 97%

confidence to guide and support library users						The Learning Committee (TLC) released a survey to identify gaps in staff competencies and released relevant modules including: • Internet and Web Browsers • Common Devices • Library Databases and Applications Staff completion rate of learning modules is upwards of 75%.	of responding staff indicated that they had the necessary technology and training to work effectively.
Advocate for increased funding for staff training to achieve the standard as outlined by the Ontario Library Accreditation in order to expand staff access to development and training opportunities within the broader library sector	• Funding – training budget	• Increased training budget at 1% standard	Board and CEO/ Chief Librarian	2021	Ongoing	This target has been met within the approved 2022 operating budget.	This target has been requested as part of the 2023 operating budget – approval pending.
Undertake a comprehensive compensation review of all staff positions in tandem with municipality	• Update job templates • Consultation Services	• Employee compensation and benefits in alignment with industry and municipal comparators. • Pay equity with male comparators ensured	Management Team	Q2 2021	Q4 2021	A comprehensive Town-led review was completed and ultimately approved by Council in 2021. Findings will be communicated and implementation to begin in 2022.	

	Review and revise the My Independent Learning Activity (MILA) program – including an examination of dedicated funding	• Communication of MILA program to staff • Review of existing guidelines	• % of staff who participate • # of new programs and services that are prompted by MILA learnings	Management Team	Q2 2022	Q4 2022		The MILA inititave was re-launched in March and updated guidelines were rolled out to staff
	Review and revise core competencies required for staff positions	• Staff capacity • OLS supporting documents	• Informed training programs and performance appraisals • Communication of staff deliverables/ expectations	Management Team	Q4 2022	Q3 2023		
	Expand, document and formalize Person in Charge (PIC) training.	• Staff capacity	• Updated PIC documentation • Comprehensive and consistent PIC training for all Coordinators.	Management Team	Q1 2022	Q4 2022		The document has been reviewed modified throughout the year.
	Conduct bi-annual staff engagement survey (2022 and 2024)	• Consultant support and survey availability	• % of staff who participate • % of staff who indicate that they are satisfied/ engaged	Management Team	Q3 2022	Q3 2024		Launched December 6, 2022
Invest in digital resources and expand virtual branch experiences	Explore and leverage all capabilities of the Symphony Integrated Library Software (ILS)	• Staff training and improved understanding of the system	• Improved system automation and staff efficiency	Management and staff	Q3 2022	2023		
	Grow virtual and hybrid services and programs	• Availability of necessary technologies	• Offering hybrid programming • Increased # digital checkouts • Increased # online library cards created	Management and staff	2022	2024		Virtual programming still being offered with hybrid option available for some programs such as our Bethell Hospice collaborations

	Better leverage the Library's website as a means of engaging and informing community members	• Staff capacity • Integration with new catalogue	• # of webpage visits • Length of visits	Management and staff	2022	2024		The new catalogue was integrated into the website. Ongoing review and updates to the website throughout the year
Enhance efforts to bridge the digital divide by investing in technologies for exploration, learning, connection, and creativity	Expand technology-based special collections and electronic resources	• Funding; Survey of community interests and needs; staff capacity	• Increased availability technology based special collections • Increased usage of collection	Management and staff	Q4 2021	Ongoing	The Library of Things was expanded to include GoPro cameras, Arduinos, and Raspberry Pi kits; Community Connection Kits continue to be well used; and, Grant funding was received to procure Seniors' Connection Kits and provide related programming.	New Osmos Lendable collection launched.
	Expand the Tech Savvy Teens program and offer more intergenerational technology-based programs	• Student volunteers with necessary skills and knowledge; promotion of program; space to offer programs; equipment that can handle the needs of the program	• Increased confidence among Tech Savvy Teen volunteers • Increased # tech-based teen volunteer led initiatives	Management and staff	Q4 2022	2023		Tech Savvy Teens re-launced in November 2022 in Bolton and Southfields branches
	Investigate partnerships with community organizations focused on developing tech skills in seniors	• Understand the tech needs of seniors; space	• Increased # tech-based partnerships benefitting seniors.	Management and staff	Q4 2022	Ongoing		Caledon Community Services, *Cyber-Seniors* program

							has resumed in the fall of 2022

Priority: Respond to Community Needs

Objective	Planned Action	Necessary Supports/Prerequisites	Success Indicators	Responsibility	Timeline		2021 Year End Status	2022 Year End Status
Support Caledon's recovery as we emerge from the COVID-19 pandemic	Remain flexible with pandemic restrictions and operational changes	• Government and Health guidelines • Staff capacity	• Varying services offered throughout all phases of the pandemic • Gradually increasing public usage of library services	Management and staff	2021	ongoing	Health and Safety protocols continue to be monitored and adjusted based on public health guidelines and in alignment with Town and sector best practices.	Health and Safety protocols continue to be monitored and adjusted based on public health guidelines and in alignment with Town and sector best practices
	Return all branches and services to pre-Covid hours of operation and adjust staff hours and schedules to ensure proper coverage	• Government and Health guidelines • Staff capacity and recall of all staff	• All locations running at full capacity • Increased # of people in branches	Management Team	Q4 2021	ongoing	Return to near-pre-COVID hours of operation, planned for early January 2022 was delayed due to increased case counts and transmission rates.	Return to pre-COVID hours happened then had to be pulled back due to staff shortages.
	Slowly expand our in-person programs, with a continued awareness of appropriate Health and Safety protocols	• Health guidelines and capacity limits • Consultation with Town Health and Safety Advisor	• Increased attendance at programs	Management and staff	Q1 2022	Q4 2022	In person programs scheduled for early 2022 were reverted to a virtual format in response to increased case counts and transmission rates.	In person programming resumed in June 2022
	Develop and provide mental health programs and resources for the public through regularly planned and scheduled programs	• Staff capacity • Community partnerships • Partnerships with social agencies	• # of programs offered • # of participants • Positive feedback and outcomes from attendees	Management and staff	Q4 2021	ongoing	Programs in partnership with Bethell Hospice, Alzheimer's Society, Punjabi Community Health,	Over a dozen programs about mental health in partnership with Bethell Hospice have been offered.

						community Mental Health workers were hosted throughout the year.	
Link residents to groups, agencies and resources by reviving and growing our Community Corner, including development of a formal agreement	• Community partnerships • Space within facilities	• Community Corner expanded beyond Bolton • Community Corner is regularly booked by organizations • Statistics show that services are regularly used • # of hours at Community Corner	Management and staff	Q2 2022	ongoing		A community partnership agreement has been created and the Community Corners in Bolton and Southfields have been launched.
Advocate for and support the Library's inclusion within joint recovery efforts	• **Continuation of positive and strong relationship with municipality**	• **Demonstrated value of library's contributions to community recovery** • **Community recognition of Library as a means of public support and assistance during periods of transition**	**Board and CEO/Chief Librarian, Management Team**	**Q2 2021**	**Q4 2022**	**Library participation in the Town's EOC continued throughout 2021; Library acted as distribution site for pick up of seniors' gift bags and other municipal initiatives.**	
Extend support to library staff that includes reminders of available resources such as Employee Assistance Programs	• Regularly scheduled Performance Appraisals and one-one manager/staff meetings • Regular staff pulse surveys and check-ins	• Increased staff productivity • Increase in staff engagement	All Staff	Q3 2021	ongoing	A pulse survey of staff was completed in the fall of 2021; An all-staff meeting was hosted in November 2021. These will continue four times annually; The performance appraisal process	CAMH Mental Health training was completed by staff, commitment to 4 quarterly all staff meetings, EAP resources shared throughout the year.

							and regular meetings with individual staff are ongoing.	
	Explore and provide opportunities for reconnection between new and established staff members	• Opportunities to get together (Bolton opening) •Technology to support remote connectivity	• Staff are aware of and familiar with personnel roles and all new and existing staff members	All Staff	Q1 2022	Q4 2022		New staff to meet with all departments, new staff announced at quarterly meetings, opportunity at training such as staff forum for staff to connect.
Eliminate barriers to library access	**Review of policies through a lens of barrier reduction**	**•Continued support for and engagement within the bi-annual policy review process**	**• Policies that allow for equity of access to library services**	**Board and CEO/Chief Librarian**	**Q3 2021**	**Ongoing**	**The following policies were drafted or reviewed in an effort to eliminate barriers:** **• Collection Development Policy** **• Indigenous Respect and Acknowledge ment Policy**	**The following policies were drafted or reviewed in an effort to eliminate barriers:** **• Operational Policy** **• Patron Code of Conduct** **• Programming Policy** **• Diversity and Inclusion Policy**
	Support the elimination of overdue fines beyond 2021	**•Reduction of fine-related revenue within the base operating budget**	**•Increase in usage of library collections and services** **•# of active library members** **•# of items borrowed**	**Management Team and Board**	**Q4 2021**	**Q1 2022**	**The permanent elimination of overdue fines was supported by the Board and Council through the 2022 budget process**	**The Operational Policy and Town Fee Bylaw were updated to reflect the elimination of overdue fees**
	Increase hours of operation and branch access	• Staff capacity • Increase of operating funding	• Increased hours • Increased access to branches	Board, Management and Staff	2023	Ongoing		

		•Increased usage of physical library services					
Grow our Visiting Library Service (VLS) by creating a working group and seeking out new partnerships	• Partnership development • VLS participants • VLS partners • Awareness of VLS program	• Completed VLS process and documentation • # of people using the service •# of community partners providing VLS	Management and staff	Q2 2021	Ongoing	Outreach to the following senior's residences has taken place: • Abbeyfield • King Nursing Home • Sorrento • Peel Community Housing 7 new volunteers were recruited and trained; 10 new residents signed up for the service, 8 are now actively receiving monthly deliveries of library material.	As of August 2022, there are 22 active clients and 18 active volunteers; Presentation provided to Sorrento VLS postcard included in June Senior's month swag bags
Develop new hybrid program delivery models for in-person/virtual programs	• Technology to support hybrid programs • Staff expertise for program development	• # of hybrid programs offered • Attendance at hybrid programs, both physical and virtual • Positive outcomes from programs	Management and staff	Q2 2022	Q4 2022	Technologies in support of hybrid programming, including smart screens and speakers, were purchased through Safe Restart funds. Screens are to be installed in the Albion Bolton Branch as part of the renovation.	Though a number of programs were delivered in a hybrid manner a formal model determining the most appropriate delivery channel has not yet been completed.
Explore partnerships with local social agencies to determine ways in which	• Understanding of current and future needs of library users	• # of library cards created as a result of these partnerships	Management Team	Q2 2022	Q4 2024		The community corners were reinstated at the

	to improve library access to underserved and marginalized groups	• Discussions with agencies regarding clientele needs	• # of people utilizing resources and spaces in library • Increase in people visiting Community Corner					Bolton and Southfields branches in Q4
	Expand the strength and awareness of our Wi-Fi access points in all branches	• Technology to support expanded Wi-Fi • IT department capacity	• Increase in Wi-Fi usage statistics	Management and staff	Q4 2021	2023	New signage, promoting the availability of wireless networks, was installed in branch parking lots. This partnership between the CPL Communications and Community Development Department and Town Community Services was prompted by a staff Beyond the Den suggestion.	
Engage community members to gain insight into their needs with an emphasis on spaces, services and programs for teens and older adults	Engage with residents and members of the community informally, using social media and in-person discussions to discover areas where the library can offer support	• Staff capacity • Opportunities for discussion and engagement	• Increased social media engagement using analytics • Suggestions and feedback received from the community	Management and staff	Q1 2022	ongoing		"Have Your Say" public suggestion boxes were reintroduced in October
	Leverage the engagement opportunities of the Master Plan to undertake targeted surveys to determine community needs for programs and services	• Staff capacity • Make use of focus groups that will be used to inform the Master Plan • Master Plan process in place	• Metrics and analytics gathered from surveys that inform programs and services • # of programs and services that address	Management Team	Q3 2022	Q4 2022		Public Survey completed in fall with over 1,000 responses

		specific community needs • # of attendees at programs • Increased use of library services					
Leverage the work of the Community Outreach Committee to engage the community and prompt discussion around community needs	• Community Outreach Committee revived • Pandemic restrictions eased	• # of events attended	Management and staff	Q3 2022	ongoing		Community Outreach Committee is on hiatus and a new community outreach model has been implemented. Discussions about community needs have been occurring at various outreach events
Develop job description and recruit for new Community and Creation Coordinator position	• Redeployment of existing staff and skill sets within the IS department	• Hiring process complete and new person in the role	Management Team	Q2 2021	Q3 2021	The position description was completed and the role was filled in the summer of 2021.	
Develop community profiles	• Staff capacity • Use of and access to Town Environics database •2021 Statistics Canada Census Data	• Community profiles created • Improved understanding of neighborhoods to inform programming, collections, and services	Management and staff	Q2 2022	Q4 2022		Some work has taken place on this through the Comprehensive Growth Plan. Community and Creation coordinator has almost completed Community Profiles for library and Board use

Cultivate a culture of collaboration by contributing to shared priorities to improve community vitality and reduce isolation	Seek out new community groups for partnerships that will support social engagement and a sense of neighborhood belonging	• Partnership development • Staff capacity	• Increased use of services, collections, programs • Increase in # of active cardholders	Management and staff	Q1 2022	ongoing		Created a process for CPL to share community information with a dedicated page on website
	Continue to build our internal community partner directory to ensure we have an updated inventory of organizations and partners	• Staff capacity	• Staff are able to quickly identify community partners for collaborative purposes • Increase in # of community partners	Management and staff	Q1 2021	ongoing	Developed in preparation for strategic planning engagement and in support of CPL's Business Continuity Plan	Updated for use in engagement of stakeholders by Comprehensive Growth Plan consultants.
	Explore capabilities of our library catalogue to develop a community support directory integrated into the library catalogue	• Catalogue capability • Migration to Bibliocommons • Staff capacity	• Seamless and easy customer access to local community organizations • # of visits to directory	Management and staff	Q2 2022	Q4 2022		
	Continue to work with The Exchange to develop ongoing shared program and service opportunities that support the Caledon community	• Continuation of positive and strong relationships with The Exchange •Library representation at various levels	• Library is viewed as a valuable partner • # of shared programs and services offered and attended	Management Team	Q1 2022	2024		Exchange Community Connections Leadership Network (CCLN) has not met consistently through 2022. Further opportunities for collaboration are being considered as part of Region of Peel funding opportunity.
	Ensure that library programs and services address social relationships and social	• Staff capacity • Canadian Index of Wellbeing descriptors and data	• Positive feedback from library customers	Management Team	Q2 2022	ongoing		Programs throughout the year have focused on various aspects

values as described in the Canadian Index of Wellbeing	•Include CIW questions in Staff Engagement surveys	• Increased and ongoing attendance at programs •Positive indications of wellbeing from surveys					of the index including Education, Environment and Healthy Populations
Conduct a Social Inclusion Audit (SIA) based on the Canadian Urban Libraries Council (CULC) guidelines and begin work to further develop and refine inclusionary practices	• Funding for SIA toolkit • Staff capacity	• Greater understanding of the community and its needs (Openness) •Barriers to inclusion are being reviewed and removed (Intentionality) • Increased staff and Board diversity • Increase in demand for library programs and services • Increase in collaborative community partnerships	Management Team	2024	2024		
Develop Seniors Connection Kits and related programming to address isolation and support digital learning	• Grant funding • Staff capacity	• # of circulations • Outcomes and impacts from users	Management and staff	Q3 2021	Q1 2022	Grant funding was received; Hardware for kits has been purchased; Rollout of kits and related programming is delayed to February 2022 as a result of inability to deliver in-person programming given COVID case counts and increased transmission.	

	Continue to build relationships and networking opportunities with similar sized libraries to share ideas/wins/challenges	• Staff capacity • Positive relationships with existing library groups	• Inclusion in regional library initiatives • Inclusion in sector wide opportunities and initiatives	Management and staff	Q1 2021	ongoing	CPL is actively participating in the following new opportunities for networking: • Peel Regional Libraries Marketing Group • Youth Services Regional Group; • Peel Library CEO monthly meetings.	CPL continues to participate in the noted orgs of 2021, as well as OLC, which has provided some drop in/networking opportunities
	Organize and host events that will provide information to help inform residents during the next federal, provincial, and municipal elections	• Room availability • Candidates willing and available for all candidates meetings • Staff capacity • Municipal guidelines	• Public attendance at all candidates' meetings	Management and staff	2022	2024		No events were hosted in support of 2022 elections.
Act as a portal for self-directed learning	Provide access to collections, resources and technologies that support and meet community demand	• Funding to support new collections, resources • An understanding of the community needs • Implementation of Bibliocommons for improved access to collections • Physical spaces	• Increase in circulation and usage of collections and resources	Management and staff	Q4 2021	ongoing	New online learning resources launched in 2021 included LinkedIn Learning and Brain Fuse; New online catalogue launched.	New online resources incude: Historical Toronto Star, LOTE, Beanstack; 7 new multilingual magazines added; Scanning pen, Osmos, Ozobots, Walking Poles added
	Develop a parenting collection	• Sustained funding to support new collection	• A current, well used collection as determined by usage statistics	Management and staff	Q3 2022	Q4 2022		This has been deferred to 2023.
	Develop a set of learning kits that will support difficult and challenging conversations	• Funding to support new collection • Formation of a Collection Review Committee	• # of circulations • # of kits that address identified social concerns	Management and staff	Q2 2022	ongoing		With the support of the Collection Review Committee, prelimimary work

		• Review and update of the Collection Development Policy	• Qualitative feedback from customers					by staff includes the creation of 2 "Conversation Kits", to be rolled out in 2023
	Continue to monitor demand to grow our online courses and learning supports	• Process for tracking demand and customer requests • Usage statistics	• Increased and more relevant resources for users • Increased usage of online courses •Increase in usage statistics	Management and staff	Q3 2021	ongoing	Online database usage has been reviewed and relevant databases renewed for 2022; New databases added for 2022 include LOTE (Languages Other Than English) for Kids and Beanstack (replacing READsquared)	Online database usage has been reviewed and relevant databases renewed for 2022;
Expand services and supports to local businesses and entrepreneurs	Leverage the re-imagined Margaret Dunn Valleywood to introduce new and enhanced services to local businesses	•Staff capacity and expertise • Suitable technology in place • Partnerships with local businesses	• # of visits • # of new library card holders • Usage/statistics of available Maker technology • Positive feedback from Community, businesses, Council and local media	Management and staff	Q3 2022	ongoing		Pending opening of the collaboration studio in Spring 2023
	Offer lendable web conferencing kits	• Budget • Staff capacity	• # of circulations	Management and staff	Q2 2022	Q3 2022		
	Lobby to ensure that the Library is invited to all Town business events	• Staff Capacity • Continuation of a positive and strong relationship with Town and Council • Lifting of Covid restrictions	• # of events attended annually • Greater visibility at events	Management and staff	Q1 2022	ongoing		CPL is a member of the Caledon Chamber of Commerce CPL participated in Mayor's Business Lunch sharing information and demonstrating of new technologies

	Ensure that the Library's business services are consistently reflected in Town's business resource lists and communications	• Continuation of a positive and strong relationship with the Town's media relations department	• Improved awareness of library services	Management and staff	Q1 2022	ongoing		CPL was regularly featured in Town's Business eNews
	Expand the print and digital business collection	• Re-allocation within the collections budget to support expansion of collection • Completion of Margaret Dunn Valleywood business hub	• Increased circulation statistics of collection • Collection of current materials that reflect current business needs	Management and staff	Q4 2021	Q4 2022	Purchasing has begun for MDV branch to support business and maker needs.	Purchasing has continued for MDV branch to support business and maker needs.
	Explore the feasibility of providing extended hours access to library branches and services for businesses and entrepreneurs	• Staff capacity • Technology support • Future branch design to include after-hours access points	• Increased hours of access and services	Management Team	2023	2024		This has been considered as a recommendation of the Comprehensive Growth Plan.
	Develop a policy that informs how we offer bookable meeting rooms and spaces equipped with presentation and conferencing technology	• Room and space availability • Agreement with Town • Staff capacity	• Clearly defined policy • # of times rooms are booked or equipment is used	Management Team	Q3 2022	2024		A software platform has been procured to support the booking of maker tech and eventually meeting rooms. To be launched in Q1 2023.
Deliver a positive customer experience, both in-branch and online	Introduce an improved online catalogue experience	•Bibliocommons migration	• User-friendly catalogue • Users able to easily access materials • Improved search results relevancy	Management and staff	Q1 2022	Q2 2022	Bibliocommons was launched in December 2021. This new online catalogue offers smarter more intuitive searching, improved browsing and the opportunity for our customer to engage socially.	

Re-launch the Customer Experience Committee	• staff capacity • opportunities for committee meetings	• Staff awareness and application of Customer Service promise on a daily basis •Increased customer satisfaction as determined through customer surveys	Management and staff	Q1 2022	Q2 2022		This was relaunched in November 2022 though missing some staff as we continue to be short-staffed. The committee has identified goals for 2023
Develop more robust Customer Experience training for staff, and empower staff to adopt a "see it, touch it, resolve it" attitude	• Niche Academy learning modules • Funding for training • Scheduling for staff training	• Consistently trained staff with excellent customer service skills • Positive feedback from customers • Lower number of requests for Management intervention • Clearly defined service model	Invest in digital resources and expand virtual branch experiences	Q1 2022	Q4 2022		As part of the above-mentioned committee's goals for 2023, is the idea of either creating or finding some specific training for Library staff around customer service and dealing with difficult customers.
Develop staff "Tech Tubs" and guidelines to support staff learning	• Funding for contents of tubs • Opportunity and time for staff to use the tubs	• Increased staff ability to support customer technology requests • Decrease in # of IT support tickets	Management and staff	Q2 2022	Q3 2022		Preliminary work begun by TLC but shortages and other priorities paused Tech Tubs in 2022. While new staff is provided access to in conjunction with a short digital orientation (via a Welcome to Niche Academy tutorial), a live orientation will be offered starting in January, 2023.

	Integrate our Customer Service Promise into our policies and decision making	• Excellent knowledge by all staff of the Promise	• Clear demonstration by staff of the Promise through actions •Increased customer satisfaction as identified through customer surveys and feedback	Management Team	Q2 2022	ongoing		The Customer Service Promise is prominently featured in staff onboarding.
	Develop and implement a service model where the customer is the service point	• Staff education and training	• Staff utilize roaming service and seek out customers within the library • Clearly defined service model •Increased customer satisfaction as identified through customer surveys and feedback	Management and staff	Q1 2022	ongoing		This work is ongoing. Staff at larger branches are asked to roam the branch, approaching patrons to offer assistance.
	Implement a “book a staff expert” program	• Staff capacity • Booking policy and guidelines	• Service is being used regularly • Positive customer feedback	Management and staff	Q3 2022	Q4 2022		Planned for Q1 2023
Facilitate programs that are relevant, responsive, informative, and engaging	Ensure the needs of local businesses, teens and older adults are reflected in our programs and services	• Completed needs assessment survey	• Increased attendance at programs	Management Team	Q2 2022	ongoing		This work is ongoing.
	Ensure we have staffing capacity and technology capabilities to provide a variety of virtual, in-person, hybrid and self-directed programs and services	•Staff capacity •Technology	• # of programs developed • # of attendees	Management and staff	Q2 2022	ongoing		This work is ongoing. Appropriate technoglogy is available in Bolton and SFV

Develop a formal programming strategy that responds to community needs and interests and supports the priorities of the library's Strategic Plan.	• Community needs assessment as part of the Master Plan	• Programming strategy developed and implemented and programming process is streamlined for staff • Positive anecdotal feedback and testimonials • Increased program attendance	Management and staff	Q4 2022	2023		A Programming Working Group established which will help inform CPL's programming strategy.
Create staff programming kits to ensure consistent quality and delivery of virtual or hybrid programs	• Funding for kit contents	• Kits created and used by staff • More consistent programming • Higher quality of programs	Management and staff	Q2 2022	Q3 2022		Program delivery by staff not already doing programs on hold because of staff shortages; this work will pick up when staffing complement increases
Use Community Profiles, demographics and needs assessments to inform program planning	• Community Audit completed • Completed community profiles • Completed community needs surveys	• # of programs offered • # of attendees at programs	Management and staff	Q4 2022	2024		
Secure well-known and representative speakers with subject expertise	• List of where to find these people • Funding for honorariums • Staff capacity	• # of program attendees • Positive feedback from LibraryAware surveys	Management and staff	Q2 2021	ongoing	Multiple programs offered with subject experts (Natasha Henry, Darin Wybenga, Bethell, Ontario Parks, TRCA and many more)	A variety of local experts and partners – i.e. TRCA, Music Therapist, Indigenous speakers, Master gardeners, Bethell, – secured throught out 2022.
Develop a Teen Café	• Teens to be aware of program • Gathering space	• Teen Café developed and running	Management and staff	Q2 2021	Q4 2022	Teen Café was launched thanks to the assistance and insights of a group	The Teen Café continues to create and/or host a minium of 3 teen-

			• # of teens attending • # of teens interested in running program				of 8 teen volunteers; The initial series of six (6) Teen Café events garnered better than expected attendance, with the average number of teens in attendance between 12 – 15/program.	focussed programs/events.
Partner to enhance and expand community services with shared program offerings, while avoiding duplication	Empower partner agencies to offer services within library branches	• Continuation of strong community partnerships • Space availability in branch • Relaunch of the Community Corner	• Increase in services offered within branches • Recognition of the library as a valued community partner • Increase in # of unique programs being offered through Caledon	Management and staff	Q2 2022	ongoing		Created a process for CPL to share community information with a dedicated page on the website and re-established the community corners in AB and SFV
	Explore opportunities to work with local media outlets to provide library programs and services	• Staff capacity • Agreements with local media outlets • Staff training	• # of programs offered • # of attendees • Media reach	Management and staff	Q4 2021	Q3 2022	Deferred to Q1 2022 due to COVID restrictions.	Partnership with "Just Sayin" Caledon" to provide weekly content for their website, sovial media and eNews
	Provide outreach programs in unexpected places, seeking out community locations and partnerships	• Outreach committee relaunched • Community and Creation Coordinator • Opportunities for events • Suitable locations	• # of programs and events • # of attendees	Management and staff	Q1 2022	ongoing		Staff offered/attended 31 events beyond the walls of the library, engaging 2366 residents in 2022.
	Partner with Town of Caledon to explore pop-up location opportunities	• Positive municipal relationships	• # of pop-up locations offered • # of attendees	Management Team	Q2 2021	ongoing	Regular monthly meetings with Town staff to	

	• Availability of space and locations throughout Caledon • Staff capacity	• # of programs offered				develop a shared vision for maker spaces, includes discussions of downtown Bolton pop-up opportunities as related to the Downtown revitalization and the repurposed Fire Hall.	
Work with Town of Caledon to develop a shared vision for Makerspaces	• Positive municipal relationships • Staff capacity	• Clearly unified direction for Library and Town	Management Team	Q2 2021	ongoing	Regular monthly meetings with Town staff; Library staff provided input for community survey and shared a list of potential Maker technology. Coordinated visit to Innisfil Library and Idea Lab	The proposed Maker and Emerging Technologies Coordinator, if funded, will be made available to provide occasional programs at the Humber River Center in collaboration with Economic Development
Host free tax clinics	• Partnership development with community • Tax experts • Available space • Staff capacity • Approved site	• # of attendees at clinics	Management and staff	Q1 2022	Each subsequent year		Virtual tax clinics were offered during 2021 tax season (March-April 2022)

Priority: Celebrate Culture & Inclusion

Objective	Planned Action	Necessary Supports/Prerequisites	Success Indicators	Responsibility	Timeline		2021 Year End Status	2022 Year End Status
Ensure that our spaces and services are welcoming & accessible to all, and our collection represent all voices	Develop and grow programs, collections and services that reflect Caledon's diversity	• Access to data obtained from: Environics and/or Census, and community surveys (pursuant to Master Plan)	• # of new programs • # of new collections • # attending programs • # of completed surveys • Circulation stats	Management and staff	Q1 2021	Ongoing	Programs offered in partnership with Punjabi Health Services; ongoing discussions with LINC for program partnerships; planned Indigenous program series; Urdu titles added to World Language collection; New online database, LOTE (Languages Other Than English), added to digital collection.	A variety of diverse programs continue to be offered – i.e. CPL's Pride Book Club – in addition to new offerings, namely a children's diverse book club, diverse reading challenges offered using Beanstack. and CPL's Indigenous Series. 7 Multilingual magazine subscriptions added.
	Conduct regular diversity audits of our collections	• Staff capacity • Depending on the collection, access to physical collections • Diverse collection (industry) standards	• Ensures diverse community stakeholders can see themselves represented in physical and digital collections: • # of completed diversity audits • # of new diverse collections added/modified • Circulation stats	Management and staff	Q1 2021	Ongoing	Initial diversity audit of collection has been completed and subsequent audits of various collections continue.	A diversity audit of Bolton and Southfield's juvenile fiction and adult non-fiction collections completed.
	Work collaboratively with library sector partners to evaluate catalogue subject headings to be more inclusive	• Continue positive partnerships with Library Services Centre and Ontario Library Consortium	• # of catalogue records updated • Ease of access for users, improving search function	Management and staff	Q1 2021	2024	Implemented use of respectful subject headings for all new indigenous titles,	Retroactive colonial subject headings have all been updated to

	• Cataloguing (industry) standards	• Circulation stats				as provided by Library Services Centre (LSC); Initiated exploration of options for retrospectively changing existing subject headings with assistance from LSC. Plans to move forward on hold until early 2022 due to staffing changes at LSC.	respectful subject headings
Investigate suitability of new Diversity, Equity and Inclusion feature in Collection HQ to evaluate representation of diverse populations in print and digital collections	• Staff capacity to analyze Collection HQ reports to determine percentage of collection that should reflect diverse needs of community • Diverse collection (industry) standards	• Collection diversity meets or exceeds the standards, thus addressing and supporting non-English speaking community members	Management and staff	Q2 2022	2024		Work is ongoing.
Maintain active membership on the Regional Diversity Roundtable	• Staff representation on committee • membership fee and signed commitment	• # of new Diversity, Equity and Inclusion strategies • # of new collaborations with Regional Diversity Roundtable partners	Management and staff	Q1 2021	Ongoing	Two staff members continue to represent the Library at meetings of the Regional Diversity Roundtable; Key meeting takeaways are shared with all staff via email.	Two staff members continue to represent the Library at meetings of the Regional Diversity Roundtable; Key meeting takeaways are shared with all staff via email.
Partner with the Town of Caledon's Accessibility Advisory Committee in	• Positive municipal relationships	• Physical barriers are removed in library spaces	Management Team	Q3 2022	Ongoing		

support of removing barriers to accessibility.		contributing to easier access by all community members • Website is accessible for hearing and visually impaired • Community awareness is raised and the library is identified as being accessible					
Ensure public workstations and physical spaces meet all new and updated AODA requirements		• Increased accessed • Increase use of workstations	Management Team	Q1 2021	2024	New accessible workstations, including accessible features and software, have been installed at all branches; Automatic openers have been installed on the bathroom and branch entry in Caledon Village. This installation is grant funded.	Shelving and furnishings in the renovated Albion Bolton Branch were placed to ensure alignment with accessibility guidelines.
Ensure all renovated branches have improved accessibility (i.e. automatic doors)	• Funding • Positive municipal relationships	• Renovated branches are accessible which supports equitable access to branches and increased use of space o# of customers supported	Management Team	Q1 2021	2024	Grant-funded automatic door openers will be installed on bathrooms and branch entrances during the renovation; New Bolton shelving has been located to ensure alignment with AODA guidelines;	Automatic door openers were installed as part of the Albion Bolton Branch renovation.

						New Bolton service desk features prominent accessible component; Height adjustable desk has been procured for public accessible workstation.	
Actively participate in the design process of new branches in Caledon East and Mayfield West to ensure accessibility of new spaces	• Positive municipal relationships	• New branches are accessible which supports increased use of space o# of customers supported	Management Team	Q1 2021	2024	Accessibility consideration are fully integrated within the design process.	
Investigate implementing closed captioning feature on video sharing platforms (i.e. YouTube, Zoom) including establishing criteria for what is being closed captioned	• Staff capacity	• Live and recorded library program content accessible by closed captioning • availability of transcripts	Management and staff	Q1 2021	Q4 2021	Close captioning features have been used in most virtual programs though criteria have not yet been established.	
Explore functionality of MagnusCards to support customers with cognitive disabilities	• Magnus Card app	• # of customers supported	Management and staff	Q2 2022	2023		
Commit to continued education of the Board in regards to the importance for equity and inclusion and the elimination of systemic racism and oppression	• **Revisions to relevant policies including board acknowledgments** • **Board training budget**	• **# of development opportunities** • **# of trustees in attendance** • **Responses to session evaluation surveys**	**Board and CEO/Chief Librarian**	**2021**	**Ongoing**	**The Board participated in Diversity, Equity and Inclusion training provided by Harmony@Work (June 2021);**	

			• **Continuity of development opportunities and board learning across terms**				**Monthly development discussions included a focus on core values including equity and inclusion.**	
	Policy review and proactive action and decision making through a lens of inclusion, equity, reconciliation and anti-oppression	• **Board development (as above)** • **Continued support for and engagement within the bi-annual policy review process**	• **# of policies reviewed** • **# of new policies created** • **# of decisions implemented that will have a positive impact in terms of diversity, equity and inclusion**	**Board and CEO/Chief Librarian**	**Q3 2021**	**Ongoing**	**The following policies were drafted or reviewed with a particular emphasis on equity and inclusion:** • **Collection Development Policy** • **Indigenous Respect and Acknowledgement Policy**	**The following policies were drafted or reviewed in an effort to eliminate barriers:** • **Operational Policy** • **Patron Code of Conduct** • **Programming Policy** • **Diversity and Inclusion Policy**
Strive for our Board and staff to reflect the diverse community we serve	Pursue opportunities for communicating in multiple languages	• Access to data: Environics and Census and community surveys • Translation tools • Industry standards • Staff capacity	• Criteria and parameters have been identified based on industry standards and in response to community needs • # of forms available in multiple languages (aligned with staff capacity)	Management and staff	Q3 2022	2024		CPL Mobile App has been updated with the ability translate into 24 languages
	Develop inventory of staff who can speak, write and/or translate in	• Staff survey	• Improved services to those for whom English is not their first language	Management and staff	Q1 2022	Q2 2022		This has been a key factor in recent recruitment considerations, though a formal

languages (other than English)							inventory has not yet been completed.
Work with Town of Caledon as they rollout translation services via Language Line to determine whether or not this service can be extended to CPL customers	• Positive municipal relationships	• Library implements the Language Line service to improve customer service o# of customers supported	Management Team	2022	2023		
Promote the functionality of BrowseAloud on Library's website	• Staff capacity	• # of clicks/usage	Management and staff	Q4 2021	2024	Staff are currently reviewing the product's functionality and requirements for continued use	All Browsers now have the ability to translate so instructions on "how to translate a web page" have been added to the website and staff were informed
Implement strategies for attracting and recruiting talented staff and Board members	• Use McQuaig tool to identify position suitability (staff only) • Support of Town People Services • Completed Compensation Review	• Matrix developed and implemented for attracting and recruiting talented staff and Board • # of qualified applicants • Retention of qualified staff and Board	Management Team	Q3 2021	2024	All job descriptions were updated as part of the comprehensive Town-led compensation review; The McQuaig tool has been used as part of recent recruitment efforts. Recent management posting prompted a large pool of qualified candidates.	Two "Get on Board" panel programs were offered to provide information for prospective new Board members. A request to extend health benefits to Permanent Part-time staff was included within the proposed 2023 budget.

	Inform the Board recruitment and selection process through the creation of revised position descriptions, public communications and correspondence to Council.	• **Consultation with key town staff and Council** • **Presentation to new Council regarding the Library's governance and Public Library Act.**	• **# of applicants** • **A strong pool of candidates from which Council appointments can be selected.** • **A Board complement that features a diverse range of demographics and lived experiences.**	**Board; CEO/Chief Librarian; and Advocacy and Fundraising Committee**	**Q3 2022**	**Q4 2022**		**Revised trustee job descriptions and an evaluation matrix were shared with Council via correspondence.**
	Continue to deliver on our commitment to inclusivity through expanded staff development	• Training budget • Commitment to staff time	• Strong staff competency around Diversity, Equity and Inclusion supported by completion of training opportunities	Management Team	Q1 2021	2024	All library staff participated in Diversity, Equity and Inclusion training provided by Harmony@Work and completed Dismantling Systemic Racism in Libraries modules; The keynote speaker at the Staff Forum highlighted the rich history of the Mississaugas of the Credit First Nation.	Two library staff participated in an 18 hour ARAO-DEI training course hosted by Caledon Community Services and the Regional Diversity Roundtable
Honour Caledon's heritage, environment, and local history	Develop partnerships and connections with local history organizations through in branch displays and coordination of programs; expand local history collections across all branches	• Positive relationships with local history organizations	• # of new local history partnerships • # of local history collections • # of local history displays • # of programs collaborated on	Management and staff	Q2 2022	2024		CPL participated in and supported a number of bicentennial celebrations in Caledon communities

		• # of attendees of programs					
Consult Peel Art Gallery, Museum and Archives (PAMA) to investigate digitization solutions/options to digitize local history collection	• Availability of digitization software/platform • Access to PAMA resources	• Ease of access. • Increased use	Management and staff	2023	2024		Access to digitized copies of Women's Insititute documents were provided to the Library by PAMA
Create Land Acknowledgment Policy and identify when Land Acknowledgment should be referenced	• Collaboration with Indigenous leaders/experts	• Land Acknowledgement Policy passed by the Board in support of truth and reconciliation efforts • Land Acknowledgment referenced going forward	Management and staff	Q1 2022	Ongoing		CPL's Indigenous Respect and Acknowledgment Policy created late Q3 2021.
Implement relevant recommendations from the Canadian Federation of Library Associations report resulting from the Truth & Reconciliation Commission's calls to action to see where the Library can incorporate recommendations	• Staff capacity (consider creating small committee) to review TRC report and make recommendations	• Based on Committee findings, recommendations are incorporated into library's resources and services in support of truth and reconciliation efforts	Management and staff	Q1 2022	2024		Links to resources added to the Library's website; Year-long Indigenous program series was offered
Explore opportunities to expand participation in and commitment to green initiatives with the Town of Caledon and other key community stakeholders (i.e. recycling program)	• Positive municipal and community stakeholder relationships	• Increased community awareness of library's role in commitment to green initiatives	Management and staff	Q1 2021	2024	Programs have been offered in partnership with EcoCaledon	Supported ecoCaledon's mask collection program with containers in CPL branches Library staff sit on the town "Climate Action Committee"

								CPL continues a battery recycling program. Participated in 2 Repair Cafes hosted by EcoCaledon and offered programs in partnership with EcoCaledon
	Work with the Town of Caledon's Energy and Environment Department to develop a policy/process on single use plastics	• Positive municipal relationships	• Reduction in use of single-use plastics across all CPL departments • Increased awareness of library as being 'green' conscious	Management Team	Q1 2021	Q2 2022	Staff met with the Town's Energy and Environment Division to provide information as they create a strategy for the town-wide reduction of single use plastic	
Welcome further opportunities to serve Caledon through each of our unique village branches	Collaborate with Town of Caledon's Tourism in an effort to highlight smaller branches	• Positive municipal relationships	• Smaller branches promoted and become recognized as a tourist destination	Management and staff	Q3 2021	Ongoing	CPL has been featured on the Town of Caledon's revamped Tourism website "Visit Caledon".	CPL was a partner in the Town's "Art Crawl" event
	Invest in improvements to village branches as per the recommendations of the Master Plans	• Availability of funds	• # of branch visits • Length of branch visits	Management and staff	2021	2024	Related capital projects are reflected on the 10-year capital budget forecast.	Revised recommendations for improving the rural branches are referenced within the new Comprehensive Growth Plan
	Expand efforts to leverage village branches as a key service point for municipal or regional services, messaging and/or engagement opportunities	• Municipal and/or Regional requirements	• Use of branch by municipal partners	Management Team	2021	Ongoing	At the request of town and regional staff, village branches acted as a host for virtual engagement sessions in support	The village branches helped to hand out equipment to deal with the moth invasions, sell The Trailway book,

							of the Official Plan review.	Animal Shelter calendars and continues to support most things requested by the Town
Embrace our responsibility as a key cultural institution and lead the growth of arts and culture in Caledon	Increase opportunities for cultural and creation activities with courses, events, displays and spaces	• Staff capacity • Funding • Physical space in branches • Dedicated space on website • Sponsorship	• Permanent display space in all branches • # of displays • # of cultural and creation activities • # of people using creative makers spaces	Management and staff	Q3 2022	Ongoing		CPL has reactivated the Artful Caledon program with art exhibits in all branches The Artful Caledon program was expanded to include musicians and studios and will be added in New Year
	Grow our partnerships with local and regional cultural organizations	• Positive collaborations with local and regional cultural organizations	• # or new partnerships • (See Board's success indicators)	Management and staff	Q3 2022	Ongoing		
	Investigate more formal membership on local high school Art, Theatre and Music Councils, and local cultural groups	• Positive relationships with education partners • Knowledge of new and existing cultural groups	• # of formalized partnerships and collaborations	Management and staff	Q3 2022	Ongoing		
	Initiate collaborative efforts with the municipality and key cultural partners to inform a community wide culture strategy		• **Enhanced appreciation for the Library's role in nurturing Caledon's cultural landscape as measured through:** o**# of cultural partnerships**	**Board and CEO/Chief Librarian**	**Q3 2021**	**Ongoing**	CPL staff are participating in ongoing meetings with the Town of Caledon's Tourism and Culture Officer; The Artful Caledon website has been featured on the Town's newly revamped "Visit	Staff are working with the Town's Economic Development Department and Headwaters Art on a public art project

			○ **# of joint events/programs** • **# of partners seeking out joint initiatives with CPL**				Caledon" website as a culture destination	
	Determine, in tandem with Town Community Services, the feasibility of collocating a lecture hall or performance theatre within a newly constructed branch by including within the scope of the Library's master plan	• **Scope of work which aligns with that of the Town Community Services anticipated master plan**	• **A master plan that includes related recommendations** • **A shared vision with Town of Caledon Community Services**	**Board and CEO/Chief Librarian**	**Q1 2022**	**Q4 2022**		**This was not reflected within the Library's Comprehensive Growth Plan but will be addressed in discussions with the consultants tasked with the Recreation Plan.**
Support Caledon's creative talent and cultural economy by showcasing local authors, artists, performers, and makers	Expand and revamp our Artful Caledon initiative	• Positive partnerships with existing and future Read Local Caledon authors • Access to local musicians, actors, playwrights and other creators	• Artful Caledon platform expanded to include all creative talent • # of new creators featured on expanded platform	Management and staff	Q4 2021	Ongoing	The Artful Caledon Initiative was reimagined and relaunched, providing a creative platform for artists, authors and musicians (coming 2022) to promote their works both virtually and in person	Artful Caledon has 25 authors, 24 artists, and 9 musicians. Studios are being added and will be publicly launched in early 2023
	Provide physical and digital space to exhibit, showcase art within all branches	• Physical space in branches • Dedicated space on website • Tools or hardware to display art (i.e. easels, art-tracking)	• Library is recognized as a space to display art measured by: ○ Art displayed in all branches – number of exhibits and/or pieces	Management and staff	Q1 2021	Ongoing	As part of CPL's Love Your Library celebrations in October, all branches (with the exception of Bolton) hosted art exhibits and a schedule for 2022	Ongoing art exhibits at all branches. Local musicians have been included in some library events. Public Art competition will be

		○Art is featured prominently on the website				is already being populated.	launched on early 2023
Engage with local "makers" to inform decisions around what's going into Library makerspaces	• Network or directory of makers to connect with • Staff capacity	• # of collaborations with local makers	Management and staff	Q4 2021	Ongoing	Early discussions with relevant local businesses have been initiated; Visits and discussions with other Library systems have been completed to inform the creation of an inventory of recommended technology and equipment	The list technologies has been finalized and procurement has begun.
Offer Maker Fairs/Expos in library spaces or in collaboration with local maker groups	• Access to "maker" group network • Library space • Funding/budget	• # of maker fairs or expos in library spaces • # of collaborative maker events with local maker groups • # of attendees	Management and staff	Q3 2022	Ongoing		Caledon participated in a Peel Region virtual Maker Fair with Mississauga and Brampton Public Libraries

Priority: Demonstrate Our Value

Objective	Planned Action	Necessary Supports/Prerequisites	Success Indicators	Responsibility	Timeline		2021 Year End Status	2022 Year End Status
Raise awareness of our inherent value to the community and our relevance to residents' lives	Reimagine our brand and logo	• Consultant services • Inventory of where all changes will be required (signage; website; documents etc.) • Internal and external locations and both digital/physical	• New brand and logo • Consistent brand/message and brand recognition throughout the community	Management and staff	2023	2024		Proposed 2023 capital project for rebranding was unfunded. To be referenced in 2024 budget submission.

Consistently reflect CPL brand at all facilities	• Consistent communications and staff training on what our brand means	• Greater recognition across the system and all of Caledon • Collaborative efforts of all staff in understanding and communicating our brand • New community members using the facilities programs and services.	Management and staff	2023	2024		
New wayfinding signs within Caledon Ie street and facility signs	• Funding • Inventory of internal and external locations • Partnership with Town for signage within Town facilities and roadways	• # of library visits; • Community is aware of branch locations • Library branches and buildings have improved visibility in the community	Management and staff	2023	2024		Promotional posters are now being featured in Town facilities and information will be regularly updated
Support, share and respond to CPL's calculated socio-economic impact	• **Staff capacity and expertise to undertake the work** • **Access to necessary data**	• **Demonstrated return on investment** • **Improved appreciation for the social benefits of library services** • **# of opportunities for use in advocacy**	**Board, CEO/Chief Librarian, Management and staff**	**2023**	**2024**		
Engage Town Council through regular communications and presentations		• **# of events/networking opportunities CPL participates in**	**Board; CEO/Chief Librarian; and Advocacy and**	**Q2 2022**	**Ongoing**	**The new strategic plan was presented to Council**	**Regular correspondence was shared with Council including**

		• **# of presentations to Council** • **Increase in Library-Town partnerships and joint initiatives** • **# of communications received from Council** • **# of partnership or shared work initiated by Council or Town staff**	**Fundraising Committee**				**legacy and recruitment documents as well as provincial budget advocacy. Councillors were engaged as part of the Comprehensive Growth Plan process.**
Collective Marketing Strategies including Peel Region Library Card Campaign	• Partner with Town, other library systems and other organizations for collective marketing campaigns	• Increased reach of library communications and improved understanding of what the library offers • Opportunity to network with neighbouring systems • Reduced cost with joint promotional opportunities • # of new cardholders as a result of joint initiatives	Management and staff	Q3 2021	2024	CPL in partnership with Brampton and Mississauga PL launched a collective marketing campaign “Library is Key” in fall 2021. During the campaign the number of library card sign ups doubled over the annual monthly average.	CPL once again partnered with Brampton and Mississauga PL on “The Library is Key” and “Makerfest event” on collective marketing campaigns.
Develop an Annual Marketing Strategy, identifying the balance of digital and traditional marketing ensuring quality over quantity	• Define priorities, create standards and set deadlines • Confirmation of allocation funds between digital and	• More effective marketing campaigns that include prioritization of promotions finding a balanced mix of	Management and staff	Q4 2022	2024		CPl now uses a marketing plan to define priorities, create standards and set deadlines

		traditional marketing efforts	programming; collection/resources/services • Consistent messaging across the system • Staff able to clearly know what they should be promoting, when					
	Adopt and implement an advocacy workplan on an annual basis		• **Status of work plan objectives** • **# of presentations, events, communications, etc**	**Board; CEO/Chief Librarian; and Advocacy and Fundraising Committee**	**Q2 2021**	**ongoing**	**The Advocacy and Fundraising Committee of the Board have adopted a workplan to direct their efforts through to December 2021.**	**The Advocacy and Fundraising Committee of the Board have adopted a workplan to direct their efforts through to December 2022**
Grow the understanding and engagement of those who are unfamiliar with our services	**Participation in Council onboarding with focus on role of Board and requirements of the Public Library Act**	**Support of Town CAO**	• **Improved awareness of Library's unique governance and the implications of the PLA**	**Board and CEO/Chief Librarian**	**Q4 2022**	**Q4 2022**		**The CEO/Chief Librarian participated in a Council workshop, providing an overview of the Board's role, the implications of the PLA, and a tour of the Southfields Village Branch.**
	Seek out opportunities to speak to community groups and partners to raise awareness of library services	• Staff Capacity • CPL information presentations	• # of Cardholders • Current users develop a greater understanding what else we offer • Other organizations understand and appreciate the	Management and staff	Q1 2022	Ongoing		Library staff continue to deliver CPL's "Library 101" programs to community groups. Additionally, over 27,000 postcards were mailed to residents and local businesses as a

		value of partnering with CPL • # of opportunities, speaking engagements and outreach opportunities					post COVID marketing strategy to introduce and re-introduce CPL to the community. The postcard highlighted our many services and resources and contributed to a 42% increase in new members over the previous October.
Board member participation in speaking opportunities to community groups and partners	• **Availability of Board Members who are willing to speak publicly on behalf of the Board**	• **# of speaking engagement and outreach events** • **# of speaking opportunities suggested/coordinated through Board member networks** • **Increased profile of the Board and the Library's governance model**	**Board; CEO/Chief Librarian; and Advocacy and Fundraising Committee**	**Q1 2022**	**Ongoing**	**The timeline for this action has been revised to 2022 to better align with related staff efforts (above) and in response to reductions in outreach opportunities resulting from the pandemic.**	**Two panel discussions were hosted as a means of informing those interested in applying to the new term of the Board.**
Host regular public information sessions and open houses on Library plans both in-person and virtual	• Staff Capacity	• Community awareness of what is happening at CPL – AB reno; CE makerspace; MDV makerspace; Master plan • Members of the public helping to advocate for Library because	Management Team	Q4 2021	Ongoing	Social media channels and a dedicated web page have been used to keep residents apprised of the status of the Albion Bolton improvements.	Social media channels and a dedicated web page have been used to keep residents apprised of the status of the Margaret Dunn Valleywood Collaboration Studio.

			they understand what we are doing • # of sessions hosted					
	Continue to be part of the Town's onboarding process	• Staff Capacity • CPL Onboarding presentation	• # cardholders and employees register and utilize the library and share what we offer with others	Management Team	Q1 2021	Ongoing	The Town's onboarding sessions have resumed with a member of the Library's management team on hand to highlight CPL's value to new hires. Presentation slides have been updated to reflect organizational and service changes.	
	Investigate opportunities to visit local employers to participate in their onboarding process (Canadian Tire; Amazon)	• Staff Capacity • Established relationships with local employers	• # of cardholders • circulation statistics • # participants in programs • Stronger relationships with businesses	Management and staff	Q2 2022	Ongoing		
Identify and explore opportunities for collective impact with other community organizations	Participate in and contribute to municipal and community committees	• Staff capacity	• # of community partnerships • # of users • Increased usage of resources and services • Collective opportunities for resources, programs, services, marketing	Management and staff	Q1 2022	Ongoing		CPL sits on the Climate Action Committee; Ageing Well in Caledon Dufferin,; Regional Diversity Roundtable; Town of Caledon Indigenous Working Group

			• # participates in programs					
	To form and lead a committee involving a committee of partners within the Southfields Community Centre	• Staff capacity	• Collaborative programs and events with SFV community partners • Increased awareness of objectives and service provision within the SFV facility	Management and staff	2022	Ongoing		
Encourage opportunities to invest in the Library	**Develop annual budget proposals and business cases that align with Council priorities and in preparation for community growth**	• **Knowledge and understanding of Council priorities and projected community growth**	• **Increase municipal investment – both operating and capital** • **Growth of staff complement**	**Board; CEO/Chief Librarian; and Finance Committee**	**Q3 2021**	**Ongoing**	**A successful 2022 budget proposal resulted in an 8.1% increase to the Library's operating budget including the conversion of an existing part-time staffer to full time and the creation of a new Director, Corporate Services and Projects. Funded capital projects included a Master Plan and Joint IT Review in tandem with the Town.**	**Pending approval, the 2023 budget proposal includes new staffing to support the demand for service in Southfields and the relocation of the Caledon East Brnach and the MDV Collaboration Studio, as well as extended health care for PPT staff. Capital requests included a move to Microsoft 365.**
	Explore funding opportunities in support of the SFV Reading Garden	• Staff capacity • Knowledge of available grants and other sources of funding	• Grant/Funding secured to complete the SFV Reading Garden • The Reading Garden is a furnished space,	Management and staff	Q2 2021	2022	A second application to the Healthy Communities Initiative was successful, resulting in full	

			well utilized by public				funding for this project.	
	Identify sponsorship opportunities within the reimagined Margaret Dunn Valleywood Branch	• Inventory of Makerspace equipment needed	• Funding secured to purchase the Maker space equipment for the MDV branch	Management and staff	Q4 2021	2023	A sponsorship report for the Margaret Dunn Valleywood Recording Studio was approved by the Caledon Public Library Board's Advocacy and Fundraising Committee in December	
	Identify creative ways to collaborate with community partners in efforts to obtain funding in support of joint initiatives	• Good collaborative partnerships with other community organizations	• # of collaborations that achieve requested funding • Collective impact for funding with other organizations	Management and staff	Q3 2022	Ongoing		A applicaton to the Region of Peel was submitted by the CCLN as a means of improving services to the Southfields Community.
	Creative sponsorship opportunities for in-kind donations (marketing)	• Research and develop collaborative relationships with local businesses and community partners	• Enhanced marketing opportunities not tied to budget • Items or services received when there was no funding available	Management and staff	Q4 2021	Ongoing	Library Champion program continued in 2021 with CPL developing collaborative relationships with local businesses	Library Champion program continued in 2022 with CPL developing collaborative relationships with local businesses
Expand our services beyond the walls of our branches	Leverage the role of the Coordinator, Community and Creation to provide services within the community and encourage non-users to access the library	• Funding • Staff capacity	• New position is filled • Build on community connections • Successfully support the new Makerspaces and enhancing the user	Management and staff	Q4 2021	Ongoing	Coordinator has begun meeting with Senior's residences to highlight Library Services and offer new card signup	Coordinator has met with various community groups and provided Library information sessions

			capacity for new technologies					
	Ensure that the Master Plan considers the impact of outreach services on staff capacity	• Master plan funding	• Sufficient staff and volunteer capacity to support and enhance outreach	Management Team	2022	ongoing		Referenced within the recommendations of the Comprehensive Growth Plan.
	Collaborate with other organizations to identify clients requiring services or referrals – beyond Visiting Library Service	• Referral services • Relationship with community organizations	• CPL develops a greater understanding of residents beyond established customer base • Strengthen the 2-way relationships between library and other organizations	Management and staff	2023	Ongoing		
	Investigate creation and implementation of permanent virtual library cards	• Determine if there is a mechanism for confirmation of address without customer in person visit	• # digital card holders • usage of digital resources	Management Public Service	Q3 2022	ongoing		
	Reinitiate the Outreach Committee	• Staff capacity • An inventory of all the community events and prioritize	• # of cardholders • Increased usage of resources and services • # participants in programs • # of programs	Management Team Outreach Committee	Q2 2022	Ongoing		Outreach Committee has been paused and a new process created to manage services beyond the walls of the branches.
Investigate creative ways to supplement the municipal budget process	**Adopt and implement a fundraising strategy and workplan on an annual basis**	**Support of Fundraising and Advocacy Committee;**	• **Value of funds raised** • **Status of work plan objectives**	**Board, CEO/Chief Librarian, Management and Staff**	**Q2 2021**	**Ongoing**	A fundraising strategy and workplan has been approved and adopted by the Board's Advocacy	A fundraising strategy and workplan was approved and adopted by the Board's Advocacy and Fundraising

						and Fundraising Committee	Committee for 2022
Explore opportunities for grants and sponsorships	• **Inventory of potential projects that would benefit from funding** • **Recommendations from Master Plan and Strategic Plan** • **Access to Data** • **Knowledge of available grants**	• **# and value of grant applications submitted** • **Rate of success in receiving grant funding** • **# sponsorship agreements implemented** • **Value of grants received and sponsor support**	**Board; CEO/Chief Librarian; Advocacy and Fundraising Committee; and Communications & Community Development Department**	**Q2 2021**	**Ongoing**	Grants received include: • Healthy Communities Initiative funding in support of the SFV Reading Garden • Investing in Canada Infrastructure Program (ICIP) for the renovation to MDV as a makerspace and small business centre • Seniors Community Grant for funding for Connection Kits for Seniors • Enabling Accessibility funding to allow for the installation of automatic doors in Caledon Village and Bolton Sponsorship was received from Domino's Pizza for	• Sponsorship was received from Domino's Pizza for summer and fall programming; • Confirmation of IDA Ontario's Mini-Grant program to purchase dyslexia-friendly resources • In-Kind donation for use of space at Caleodn Inn for the Fundraising event – screening of "The Long Ride" documentary • Grant from Brampton and Caledon Community Foundation for funding for Indigenous Speaker Series

						summer and fall programming; Sponsorship received from the Scavetta family in support of the teen writing workshop and lecture series named in honour of their daughter Elizabeth.	
Launch a Planned Giving Program	• Approval of Fundraising and Advocacy Committee; • Review of legal counsel	• Increased funding from the Planned Giving program	Management and staff	Q4 2021	ongoing	Deferred to Q1 2022 pending legal review	Deferred to Q1 2023 pending legal review
Strengthen relationships with local businesses by expanding the Library Champions initiative	• Staff capacity • Staff networking and involvement with local business organizations (Chamber; BIA)	• Relationships for future investment possibilities • Increase in funds secured through donations and sponsorship • # of businesses that become Library Champions	Management and staff	Q2 2021	2024	Throughout 2021, CPL connected with local businesses with the Library champion program. CPL purchased prizes, offered support and created promotions to establish relationships for future fundraising and sponsorship opportunities	Continuted to establish and foster relationships with local businesses purchasing prizes and offering support
Continue to empower the FOL and encourage their fundraising efforts in support of the library	• Commitment of Library staff as Friends Liaison • Staff capacity to support/advise/collaborate with Friends	• Friends continue to financially support library activities/resources/programs beyond the municipal budget	Communications & Community Development	Q1 2021	2024	In 2021 Friends of the Library hosted 6 online mystery book box sales raising funds for CPL. They provided financial support with funding for prizes for adult and teen writing contests, and all	In 2022 the Friends supported a number of writing and photography contests, CPL's fundraising initatives and supplied funding for;local music performers at

						ages photography contest, a teen fan contest. They have also committed funds to purchase a 3D printer when the AB renovation is completed.	selected library programs
Develop a Donor Management System for CPL (i.e. Canada Helps)	• Funding - Service level change to budget ($2000 first year and $1500 subsequent years)	• Improved fundraising management • Build the infrastructure to strengthen our supporter relations	Management Communications & Community Development	2023	Ongoing		

Attachment 9-D

Date: January 16, 2023

To: Caledon Public Library Board

From: Colleen Lipp, CEO | Chief Librarian

Subject: New Tecumseth Public Library Reciprocal Membership

Recommendation:

That the Caledon Public Library Board review and approve the drafted Reciprocal Membership Agreement between Caledon Public Library Board and New Tecumseth Public Library Board.

Background

A request was recently received from the New Tecumseth Public Library to adopt and implement a revised reciprocal membership agreement (Appendix A). Caledon Public Library has no record of any such previous agreements on record. However, as per the following excerpt from the Caledon Public Library Operational Policy (CPL-16-04), residents and property owners of New Tecumseth are already entitled to a free library membership with CPL:

Membership is also available without charge to those who live or own property in one of the following municipalities bordering the Town of Caledon:

- *City of Brampton*
- *City of Vaughan*
- *Town of East Garafraxa*
- *Town of Erin*
- *Town of Halton Hills*
- *Town of Mono*
- *Town of New Tecumseth*
- *Town of Orangeville*
- *Township of Adjala-Tosorontio*
- *Township of King*

All others will be required to pay a non-resident fee of $25.00 annually.

All terms of the drafted agreement are in alignment with current CPL policies and procedures.

The formal adoption of the proposed agreement would support CPL's current operational practices and also ensure that New Tecumseth Public Library memberships continue to be extended to Caledon residents.

Financial Implication

None.

Recommended Motion

> *That the Caledon Public Library Board review and approve the drafted Reciprocal Membership Agreement between Caledon Public Library Board and New Tecumseth Public Library Board for signing by the Board Chair and the CEO/Chief Librarian.*

Appendix A

Reciprocal Membership Agreement

Between

Caledon Public Library Board

And

New Tecumseth Public Library Board

In the interests of the residents of both the Town of Caledon and the Town of New Tecumseth, it has been agreed upon to permit the reciprocal interchange of library services. Both parties agree to the following:

- They shall permit residents of the Town of Caledon and residents of the Town of New Tecumseth of obtain a membership card at the Caledon Public Library and the New Tecumseth Public Library.
- Residents of either Municipality are required to present proof or residency in either the Town of Caledon or the Town of New Tecumseth before being eligible to obtain a card from the other library system.
- Each library system sets its own policies and regulations, and members must abide by these when using their respective services. Outstanding fees, charges, replacement costs for materials, etc., are to be paid directly to the applicable library system.
- Materials must be returned to the library system from which they were borrowed.
- Both parties reserve the right to revoke or suspend the membership privileges of any user.
- Either party may terminate this agreement with 30 days written notice. This agreement may be amended by resolution endorsed by both parties.

_____
Chair, Caledon Public Library Board

_____
Chair, New Tecumseth Public Library Board

_____
CEO, Caledon Public Library Board

_____
CEO, New Tecumseth Public Library Board

_____
Executed Date

_____
Executed Date

Attachment 9-E

Date: January 16, 2023

To: Caledon Public Library Board

From: Colleen Lipp, CEO | Chief Librarian

Subject: Library Comprehensive Growth Plan

Recommendation:

That the Caledon Public Library Board review the draft Library Comprehensive Growth Plan as prepared by TCI Management Consultants for receipt and approval.

Background

TCI Management Consultants were retained in the Spring of 2022 to lead the development of Caledon Public Library's Comprehensive Growth Plan – formerly referred to as a Master Plan. Informed by the projected population forecasts, this plan will ultimately act as a road map to effectively position the Library to meet the future needs of a quickly growing Caledon. The resulting plan will also function as an advocacy tool, confirming best practices and highlighting the need for further investment in library services over the course of the next 20 years.

The drafted document references the results of public and stakeholder consultation, an analysis of Caledon's population forecasts and benchmarking with relevant public libraries. The plan includes recommendations in support of improved library services, including enhancements to existing library branches and the location and sizing of new service points, as well as suggestions for expanding services in rural areas.

Board endorsement of the plan does not represent a commitment to, or approval of, all findings contained within but a willingness to consider these recommendations as a likely means of improving the Caledon Public Library's services and facilities in the years to come. Moving forward, Board and staff will work in tandem to reflect prioritized recommendations within future strategic plans and forthcoming development charge studies.

The drafted plan, once endorsed by the current Board, will prompt the creation of a condensed and more easily consumed document for public release. This will be shared for review and approval by the new term of the Board prior to its presentation to Council in the Spring of 2023.

Financial Implication

There are significant financial implications associated with the recommendations within the Comprehensive Growth Plan. However, these implications do not result from the initial

approval of the plan itself, but from the subsequent efforts to realize specific recommendations. Funds in support of endorsed capital projects will be reflected in subsequent capital forecasts and future development charge studies (when applicable), and will be requested as part of regular annual budget processes.

Recommended Motion

> *That the Caledon Public Library Board receive and endorse the draft Library Comprehensive Growth Plan as prepared by TCI Management Consultants.*

Library Comprehensive Growth Plan

CALEDON PUBLIC LIBRARY
for all reasons

Draft Report submitted to
Caledon Public Library

January 6, 2023

TCI Management Consultants

in association with

360 Collective
Beth Ross & Associates

Bibliotechs Inc.
CS&P Architects

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Executive Summary

Background

In 2021, the Caledon Public Library adopted a new strategic plan, ***Building the Bridge to Possibilities,*** which covered the period from that year to 2024. One of the key initiatives recommended in the strategy was to map out a growth strategy for facilities and related services covering the next twenty-year period. This ***Comprehensive Growth Plan*** fulfils that strategic initiative.

The broad purpose of this work was stated in the Terms of Reference for the project as follows:

> *"The Caledon Public Library (CPL) is seeking to retain the services of a consulting firm to prepare a Comprehensive Growth Plan that will guide the Library's efforts to grow and innovate and respond to evolving community needs and expectations over the next 20+ years… This new Comprehensive Growth Plan will assess the current model of service delivery and provide an audit of all aspects of library service to the community of Caledon, including but not limited to: facilities, staffing, technology, collections, programs, community involvement, and communications."*

Following a tender process, TCI Management Consultants was selected to undertake the project. The work started in May of 2022 and was completed early in 2023.

Activities Undertaken

Specific key activities required included: an identification of relevant current trends; engagement with key stakeholders; engagement with the community through a community survey (which elicited over 1,000 responses!); an assessment of the impact of existing and future growth patterns; the preparation of a comparative analysis with appropriate peer libraries (benchmarking); an assessment of current and future facility requirements; a detailed assessment of current services, collections, technologies and programs; a review of the current and proposed organization structure; and preparation of this Comprehensive Growth Plan.

Recommendations

Twelve recommendations in four areas were made; these were: A) Branches and Facilities; B) Organization and Staffing; C) Programs and Services; and D) Technology.

As this is a Comprehensive Growth Plan, as opposed to a service review or strategic plan, the emphasis in the recommendations made here is upon the size and location of physical facilities which will help provide the framework for the CPL's plans in the Town's future capital budget. Various implications that follow from the physical facility recommendations in terms of organization and staffing, programs and services, and technology, then follow.

A) Branches and Facilities:

Recommendation #1: Adopt the four-stage growth plan: Caledon is a rapidly growing municipality and will need to expand its library spaces significantly in the coming two decades in order to provide adequate library services to its growing and rapidly diversifying population. This Report outlines a four-stage growth plan in five-year increments over the next twenty years to match the growth trajectory of the municipality. Each stage adds a major new branch to the community, in different locations to match anticipated population growth. In summary, this plan is:

Stage in the Growth Trajectory	Key Developments	Proposed Amount of Space Added to Inventory
Stage 1: 2021 - 2026	• refurbishment of Ward 1 branches (anticipated to add about 1,000 sf at Alton branch) • development of new 30,000 sf facility at Mayfield West (an increase of 10,000 sf over the previous plan) • relocation of Caledon East Branch to 9,569 sf at Caledon East Community Centre (CECC) resulting in a net addition of about 2,000 sf • Implement self-service and open access to deliver services to branches after open hours	33,000 sf
Stage 2: 2027 - 2031	• 35,000 sf at Macville/Caledon Station	35,000 sf
Stage 3: 2032 - 2036	• 20,000 sf expansion in Mayfield West	20,000 sf
Stage 4: 2037 - 2041	• 40,000 sf expansion of Albion Bolton branch or construction of secondary facility	40,000 sf

It is recommended that the Board and Council adopt this generalized trajectory as a fundamental planning principle for library facilities going forward over the next two decades. While it is understood that the specific details of planning and even size will likely be modified as each stage comes around (particularly in the later stages) this should nonetheless be considered as a general overall planning guide.

Further, new construction and/or alterations to existing facilities should achieve high performance standards for environmental sustainability and energy conservation. New Library sites and structures, serving as important community reference points, should be at the forefront of sustainable design and be exemplary, invigorating and healthy environments. It is highly recommended that the new library branches for the Town of Caledon strive to integrate Zero Carbon Buildings (ZCB) and Net Zero Energy Buildings (NZEB) principles in order to align with the Town's green building standards.

Recommendation #2: Implement self-service and open access to deliver service to branches after open hours. Implement RFID to support these technologies as required. An RFID project requires equipment such as tags and handheld and/or gate readers, plus costs for software, network configuration, cabling, electrical, space configuration and annual maintenance. Additional staff hours are needed for training and implementation. Once complete, self-check workstations and open access technology can be installed.

Recommendation #3: Adopt and implement interim service delivery modes until new branches developed: Until new bricks-and-mortar branches are developed in the locations identified in the four-stage plan, interim service provision should be offered through alternative delivery mechanisms such as a bookmobile / mobile library, holds lockers (such as those currently at Belfountain), service kiosks, open access locations, etc. As well, the possibility of leasing temporary branches in retail storefronts should be considered. These mechanisms can also be used to provide additional services in rural areas. A specific alternative service delivery plan should be developed in parallel with the four-stage plan for new branches recommended here.

Recommendation #4: Develop an Alternative Service Delivery Plan for Underserviced Areas: Even with the growth plan for new branches, there will still be some hamlets and smaller communities particularly in the northern end of the municipality that will not be within reasonable proximity of a branch. Accordingly, parallel to Stage 1 of the Growth Trajectory for new branches, an alternative service delivery plan should be developed for hamlets and smaller communities in these rural and more remote areas where it is more difficult for populations to access library services. This report has identified 16 potential service points in this regard and suggests that a number of options be investigated and considered for suitability including open access systems; pop up locations; temporary branches in retail vacancies and in existing commercial establishments; book kiosks and lockers; and a mobile library.

B) Programs and Services

Recommendation #5: The development of new and innovative in-library programs and services that respond to community need should be a staffing priority: CPL has a long track record of continuously developing new and innovative programs and services to respond to evolving community need. The community survey showed that there is a very strong recognition and appreciation of its efforts over the years in this regard. As well, however, the survey showed that there are many new ideas and suggestions for additional programs and services. (Appendix A to this Report contains a summary of these suggestions.) To some extent, these will differ from branch to branch as they serve the needs of the immediate local community. The suggestions made here should be reviewed by the staff in their on-going efforts to provide new and effective programming to the community, particularly to respond to community demographic change and as we emerge from the pandemic. **But, fundamentally, it must be recognized that new programs and services to meet the needs of the growing community will require additional staff resources. This should be a major staffing priority in the coming decades.**

Recommendation #6: Continually develop virtual and online programs and services, also a staffing priority: The pandemic has viscerally underscored the importance of providing online and virtual programs for the community. Caledon's provision of its Digital Library acknowledges the unique aspects of this kind of programming and draws greater attention to its online service offerings. Even with a return to in-branch programming, it is anticipated that demand for on-line programs will continue to grow. As with physical services, CPL should continually monitor demand and continue to provide online services and recognize that the development of additional online and virtual programming will also require future investment of staff time and resources. (Again, the community survey results shown in Appendix A contain many suggestions in this regard.) **As with the previous recommendation, this should be a major staffing priority in the coming decades.**

C) Organization and Staffing

Recommendation #7: Implement new organizational model: A new and more effective organizational model should be adopted where there are three direct Director-level reports to the CEO / Chief Librarian Position: 1) a Director of Customer Experience and Branch Services; 2) a Director of Collections and Programming; and 3) a Director of Corporate Service and Projects. These three areas cover all aspects of external and internal operations of the library system and, as the library system becomes larger and more complex with community growth, the simpler and more flexible model will more effectively accommodate change.

Recommendation #8: Implement a service model of generalist public service: Accompanying the new organizational model, all front-line staff should adopt a generalized customer orientation model so that there is a core level of public service that all users and members of the general public can expect. While this is 'generally understood' to be the model and approach followed by staff, there is not an explicitly written or articulated documentation example of what this model entails. Accordingly, such a model should be articulated, and provided to all staff (current and new incoming staff.) This will provide a more consistent level of service to the general public as well as providing greater staffing flexibility to adapt and respond to changing needs. This approach should align with CPL's organizational structure and would include, for example, offering generalist library training opportunities for management or staff with growth potential, e.g., the EXCEL program for front-line staff who don't already have a Library Tech diploma and the Advanced Public Library Leadership (APLL) program for management team members or staff who have management potential, both offered by the Ontario Library Service. Existing staff should be grandfathered but offered the opportunity to increase their skills with additional training. Investing in staff training may also lead to improved staff retention and succession planning.

Recommendation #9: Continuously monitor community use and adjust hours of operation of each branch: Monitoring of each branch for community use of programs and services should continue, including require

adjustments to hours of operation and accessibility considerations. This enables staffing decisions to be made to ensure that the branches respond not just to community growth, but also changing needs and demands in each service area. Where required, staffing should be adjusted to meet demand through "change in service level" budget requests (

Recommendation #10: Adopt a "branch team" model to pair urban larger branches with the rural branches: An operational model to be considered would be to pair larger urban branches with the smaller rural ones, so that programs and services could be provided more efficiently especially to rural areas. There could also be economies of scale in terms of contracts for the Town which owns the facilities with external suppliers (e.g., facility maintenance). In effect, larger urban branches would consider the smaller rural branches to be within their service area when planning programs and services for the wider community. (Overall, this is consistent with the Town's approach to facility management in other areas.) The proposed pairing in this regard would be:

Larger Urban Branch	Proposed Associated Rural Branches
Caledon East	- Alton - Caledon Village
Southfields	- Inglewood - Margaret Dunn Valleywood
Albion Bolton	- Belfountain Lockers - Other rural services - Visiting Library Services - Interlibrary Loan

Recommendation #11: Recruit to reflect the community: When recruiting new staff positions, seek individuals who are representative of the local diverse populations and can speak their languages, e.g., Punjabi, Hindi, etc. Over time, this representativeness of the local community should extend to the Board level as well.

Recommendation #12: Continually develop the collections: As with programs and services, the collections at the CPL must continue to grow and evolve in order to meet community demand. Additions to the physical collection will of course be necessary as the number of branches grows over times. Materials in other languages, particularly Italian, Punjabi, and Hindi should continue to be added. In addition to physical collections, an increased emphasis upon additions to the digital collection and virtual offerings will be required in future.

Recommendation #13: Expand marketing efforts with required staffing and other support resources: Key stakeholders, staff and the general public alike (through the community survey) expressed a desire to see expanded marketing efforts in order to create enhanced awareness and resulting use or participation. New marketing tools such as *Patron Point*[1] should be explored as ways of more effectively reaching existing patrons and onboarding new members as well as providing highly targeted messages regarding programs and services to specific user segments. In addition, methods of reaching out to current non-users and new residents of the community overall need to be explored, such as through active outreach campaigns that have been successful in other library systems[2]. Marketing efforts should continue to be oriented towards social media efforts, which tend to be much more effective than traditional promotional vehicles. Continual promotions and innovative ways of promoting awareness (e.g., through community events that generate free press coverage) should remain a priority. As well, the staffing and support implications of a more focussed marketing approach need to be put in place and resourced.

[1] See: https://www.patronpoint.com

[2] For example, see: https://www.infotoday.com/mls/nov16/Fletcher--Reaching-the-Elusive-Library-Non-Users.shtml#:~:text=Non-users%20will%20participate%20in%20a%20survey%20if%20it's,help%20identify%20good%20places%20to%20field%20a%20survey.

D) Technology

Recommendation #14: Develop a Technology Plan: Develop a three to five-year Technology Plan (roughly in synch with Stage 1 of the Growth Trajectory) that incorporates both the 'internal' and 'external' aspects of technology. Key components of this plan will include: a security audit and system support tools; the use of additional ILS modules for operational efficiencies; and a review of ILS license options with the growth in population and system size. Staffing, training and related operating budgetary requirements need to be built into the Plan as well as well as capital and equipment costs. This plan should also recognize the Town's overall efforts in expanding fibre and wireless networks throughout the municipality and ensure that it aligns with these efforts. (Given the pace of technological change, this Technology Plan will need to be updated and revised periodically over the twenty-year timeframe of this Comprehensive Growth Plan – ideally in synch with the Stages for growth of the branches as previously outlined.)

Conclusion

The Town of Caledon has a very highly valued and well used public library system. It has an admirable track record of continually providing innovative programs and services to its users and the general community, and has followed a diligent program of improving, expanding and adding to its inventory of library facilities to enable this. And, given that Caledon is one of the fastest growing and diversifying communities in Ontario, this program of expansion and innovation must continue.

The Comprehensive Growth Plan presented here represents a challenging but necessary program of growth and development over the next twenty years. But, while this development program may seem formidable, especially when viewed 'all at once', it simply represents a continuation of CPL's demonstrated history of responding to community need through a proactive building program as well as the provision of community-responsive programs and services. CPL has demonstrated community leadership of this type repeatedly in the past. The Comprehensive Growth Plan presented here will enable the Library to continue this leadership role well into the future.

1. Introduction and Background to the Project

This Introductory Section to the Report outlines the basic background for this project. First, a high-level **overview of the operations** of the Caledon Public Library system is presented. This is followed by another key contextual item: the recently approved **Strategic Plan** for the Library, of which the development of this Comprehensive Growth Plan was a key element. Next, the **specific objectives of this project** (as they were formulated in the Terms of Reference) are presented followed by an overview of the **structure of the Comprehensive Growth Plan** and the **specific activities and tasks undertaken** to meet these objectives. Finally, various **caveats and assumptions** underlying the work are articulated.

1.1. Overview of the Current Caledon Library System

The following descriptive overview of the Caledon Library systems is extracted from the Terms of Reference for the project:

Community Overview: The Town of Caledon is spread over 700 square kilometers in the northwestern corner of the GTA. Nestled between the Hills of the Headwaters, Oak Ridges Moraine and the Niagara Escarpment, Caledon is a true community of communities – a vibrant mix of suburban neighbourhoods, small villages and rural centers. Over 76,000 residents currently call Caledon home, with significant growth forecast in the years ahead.

Strategic Plan: A new strategic plan, ***Building the Bridge to Possibilities***, was adopted by the Library Board in 2021 and will direct the Library's efforts to achieve its new mission through to 2024 (see Section 1.2).

Facilities: The Caledon Public Library has as a key goal to ensure that residents are never further than a 15-minute drive from a library branch. The Library currently offers seven (7) locations, totaling approximately 39,000 square feet, across the municipality (see the map overleaf). With the planned relocation of the Caledon East Branch, all branches will be located in buildings owned by the Town and operated by the Town of Caledon's Community Services Department.

- The **Albion Bolton Branch** is the largest branch at 15,552 square feet. Renovations, to modernize the branch and allow for the centralization of all administrative and support staff were completed in June 2022.

- The **Southfields Village Branch** (7,768 sq. ft) opened in September 2020 and is located within a recently constructed community centre and hub in a quickly growing new neighbourhood.

- The **Caledon East Branch** (approx. 8,000 sq. ft.) is currently a shared library within a high school. This branch will be relocated to an expanded community centre in 2023 and will include an adjacent Makerspace.

- The **Margaret Dunn Valleywood Branch** (3,175 sq. ft.) has been reimagined as a learning, innovation and maker studio and is scheduled to reopen in Spring of 2023

- The **Alton** (1300 sq. ft.), **Caledon Village** (2,400 sq. ft.) and **Inglewood** (1,200 sq. ft.) branches are located within Caledon's rural villages, often serving, with the exception of fire stations, as the only municipal or community resource within the area.

- Holds pickup lockers are available within the **Belfountain Community Hall.**

Staffing: CPL's staff complement is comprised of 28 full-time staff and approximately 33 part-time employees. These are distributed across five (5) departments: Public Service, Information Services, Youth Services, Information Technology, and Communications and Community Development. With the exception of Public Service, all staff work out of the Albion Bolton Branch. Most smaller branches are currently staffed by only one staff member at any given time.

Budget: CPL's 2022 approved base operating budget was approximately $4.744 million, of which approximately 83% was salaries, wages and benefits.

Library Board: The Library is governed by a Town-appointed Board consisting of nine (9) trustees, including seven (7) community representatives and two (2) members of Town Council.

1.2. General Background Context to this Comprehensive Growth Plan: The Recent Strategic Plan

The primary context within which this Comprehensive Growth Plan is being undertaken is the recently-approved (2021) Strategic Plan for the Library: ***Building the Bridge to Possibilities***, covering the 2021 – 2024 time period. This section of the Report summarizes the main points of this plan.

Vision: To be the heart of our community – building and connecting a thriving, engaged, and informed Caledon.

Mission: We empower community connections, spark innovation and creativity, and energize the transfer of knowledge.

Values: Seven core values for the Library system provide the foundation for the strategic plan. These are:

1) ***Service Excellence:*** Caledon Public Library values each and every customer. We understand that every decision we make affects how people experience the library and because of that, our goal is to deliver an exceptional experience.

2) ***Lifelong Learning and Literacy:*** We recognize the importance of all types of literacy and know that the desire to learn and grow is lifelong. We provide the tools to help individuals achieve their goals.

3) ***Innovation, Intellectual Freedom, and Creativity:*** We encourage intellectual and artistic curiosity and support the right to seek and receive information from all points of view without restriction.

4) ***Community and Partnership:*** We value teamwork, partnership, and shared success. We will lead, partner, or collaborate to support a strong and growing Caledon.

5) ***Trust, Inclusion, and Equity:*** We acknowledge individual needs, experiences, and cultures, and we are committed to fair and inclusive access, a sense of belonging and dignity, and reflecting representative voices.

6) ***Commitment to Staff:*** We continuously strive to create a climate of employee engagement, success, curiosity, and support. We encourage and value staff as they introduce new services and lead change in their unwavering commitment to serving Caledon.

7) ***Integrity and Accountability:*** We respect the need for fiscal and environmental sustainability. We are committed to informed planning and responsible stewardship.

Strategic Action Areas:

Grow and Innovate:

Selected Relevant Key Strategies and Actions in the Plan

Respond to Community Needs:

Finally, the indicators to demonstrate success in achieving the priories of the plan were set out to be:

- We will see an increase in active library memberships
- Demand for our programs, collections and services will grow
- Library spaces are modernized and able to meet expanding community need Our branches and Makerspaces will be busy, with more visitors staying longer
- Technologies and innovations are embraced and adopted
- An increase in funds raised through donations, grants and sponsorship complements our budget
- Partners value our contributions and seek out our involvement
- Our Board, staff and leadership teams will be more diverse and inclusive
- Our staff and customers are happy and engaged

This Comprehensive Growth Plan is a key vehicle through which the Strategic Plan will be realized, particularly in terms of planning for the programs and facilities that will be required in future.

1.3. Specific Purpose and Objectives of this Comprehensive Growth Plan

Within this overall context, the broad purpose of this work was stated in the Terms of Reference for the project as follows:

"The Caledon Public Library (CPL) is seeking to retain the services of a consulting firm to prepare a Comprehensive Growth Plan that will guide the Library's efforts to grow and innovate and respond to evolving community needs and expectations over the next 20+ years… This new Comprehensive Growth Plan will assess the current model of service delivery and provide an audit of all aspects of library service to the community of Caledon, including but not limited to: facilities, staffing, technology, collections, programs, facilities, community involvement, and communications."

Specific key activities required included:

- Identification of relevant current trends

- Engagement with key stakeholders
- Engagement with the community
- Assessment of the impact of existing and future growth patterns
- Preparation of a comparative analysis with appropriate peer libraries
- Assessment of current and future facility requirements
- Assessment of current services, collections, technologies and programs
- Assessment of current and proposed staffing model; and
- Preparation of this Comprehensive Growth Plan, including a monitoring program to ensure that the Comprehensive Growth Plan remains up to date and relevant as priorities and conditions change.

Following a tender process, TCI Management Consultants was selected to undertake the project. The work started in May of 2022 and was completed early in 2023.

1.4. Structure of this Comprehensive Growth Plan

Often, the terms 'Strategic Plan' and 'Comprehensive Growth Plan' are used interchangeably. However, a **Strategic Plan** outlines future directions for growth and evolution of an organization, which tend to be largely policy directives. It may focus considerable time on vision, mission, values and key activities that the Library wishes to undertake. The notion of '**Comprehensive Growth Plan'** however, often has a more pronounced physical development component to it and is thus used more when an overall plan is meant to have a major focus upon physical development or facilities component(s) involved. A key purpose of the Comprehensive Growth Plan is also to create the framework for the municipality's future capital plan and operating budget. The Comprehensive Growth Plan can incorporate elements of the Strategic Plan. And as will be seen in the development of this particular plan, there are physical elements recommended in the improvement of existing branches as well as planned future expansion. In the case of Caledon, of course, the strategic plan was just developed in 2021, and so this Comprehensive Growth Plan with its facility and location emphasis, is entirely appropriate.

This Comprehensive Growth Plan is structured as follows:

First, the major contextual component is an analysis of the trajectory of anticipated population growth for the community and an articulation of what this entails in terms of new branches and facilities in the community. Then, the Comprehensive Growth Plan examines various other related considerations that are affected by a major expansion of the system (which is what is anticipated over the next two decades). These considerations include the future offering of collections, programs and services; technological considerations; and staffing and organizational implications.

The overall structure of the Report follows this logic. After this Introductory part, Section 2 outlines the results from all of the data collection activities undertaken and reports (at a high level) on the common themes heard and issues raised. Section 3 presents the Comprehensive

Growth Plan itself, according to the sections described. The final section deals with implementation: the timing and critical path of recommendations; the human and financial resources required; targets and outcomes; etc.

1.5. Activities Undertaken

A number of key activities were undertaken in the development of this Plan. These included:

- an on-site familiarization visit by most members of the study team
- thorough review of all relevant background materials
- a review of population projections for the next several decades
- a review of the key psychographic dimensions of the populations surrounding each branch (using the PRIZM clustering analysis tool developed by Environics)
- workshop session with the Board
- interviews with key stakeholders
- a community survey
- a confidential staff survey
- detailed benchmarking assessment of library systems in comparable communities
- analysis of the gap in provision of library space for the community, now and over the next two decades
- development of a growth trajectory scenario for additional branches designed to meet the gap
- preparation of preliminary facility plans for certain existing branches (a 'refresh and small expansion' scenario) and generic plans for new facilities
- development of a series of recommendations, and a detailed implementation plan for them
- preparation of this Report, in draft and final forms
- regular meetings with the CEO and members of the management team throughout the project

The project was started in the Spring of 2022 and completed early in 2023.

1.6. Caveats and Assumptions

There are several caveats and assumptions that need to be borne in mind when reviewing the analysis contained herein as well as the Comprehensive Growth Plan recommendations. These include:

- **the plan is predicated upon population growth:** As earlier mentioned, Caledon has seen very high population growth in recent years – much higher than the province overall. This Comprehensive Growth Plan is predicated upon this level of growth continuing over the next two decades (and beyond), based upon data provided by the Town's Planning Department. This growth, coupled with the general rate of provision of Library space of

0.85 square feet per person, gives rise to a need for space that is several multiples of the total amount of space currently being provided.

- **the analysis is high-level in nature:** Any plan that looks out 20 years into the future is necessarily high-level in nature. Not all the predictions and expectations described in this Report will come about; new opportunities will arise, unforeseen situations will become apparent, etc. This Comprehensive Growth Plan should thus be regarded as a broad general guide for future planning, and not as a specific point estimate.

- **facility plans indicative in nature:** Similar to the previous point, the facility plans presented here are also high-level and notional in nature. And cost estimates are necessarily generalizations; to be refined once more specific and detailed plans have been developed.

- **some uncertainty caused by the pandemic:** As this Comprehensive Growth Plan is being written, Canadian society is emerging from the pandemic of the last two years, and it is by no means certain that there will not be another wave. Nonetheless, this Comprehensive Growth Plan cautiously assumes that library use will slowly return to relatively normal levels over the next few years.

- **the More Homes Built Faster Act (Bill 23**): The implications of this recent proposed legislation to the Region and Caledon are unknown and are not yet reflected in the population/household forecasts – as well as the likely changes to the impact on the collection of Development Charges (DCs).

2. Data Collection and Situation Analysis

This Data Collection and Situation Analysis component of the Report presents the key findings from the various lines of research undertaken that form the basis of the Comprehensive Growth Plan. First, for context, **population growth and demographic projections** for the municipality are presented, followed by a **psychographic profile of library users** (using the PRIZM system developed by Environics). Next, a review of relevant **background policies and reports** is reviewed for key context. This is followed by a highlights overview of the key findings from primary research: interviews with **key stakeholders**; an online **survey of the community** (which elicited over 1,000 responses!); a confidential **staff survey;** and a **Board workshop.** A **benchmarking review** of comparable communities yielded very useful data on how Caledon compares on key resource and performance dimensions to similar communities. Finally, a **summary situation analysis** presents common themes and issues that arose through this research program. This synthesis of common themes forms the basis for the Comprehensive Growth Plan recommendations discussed in Section 3 of this Report.

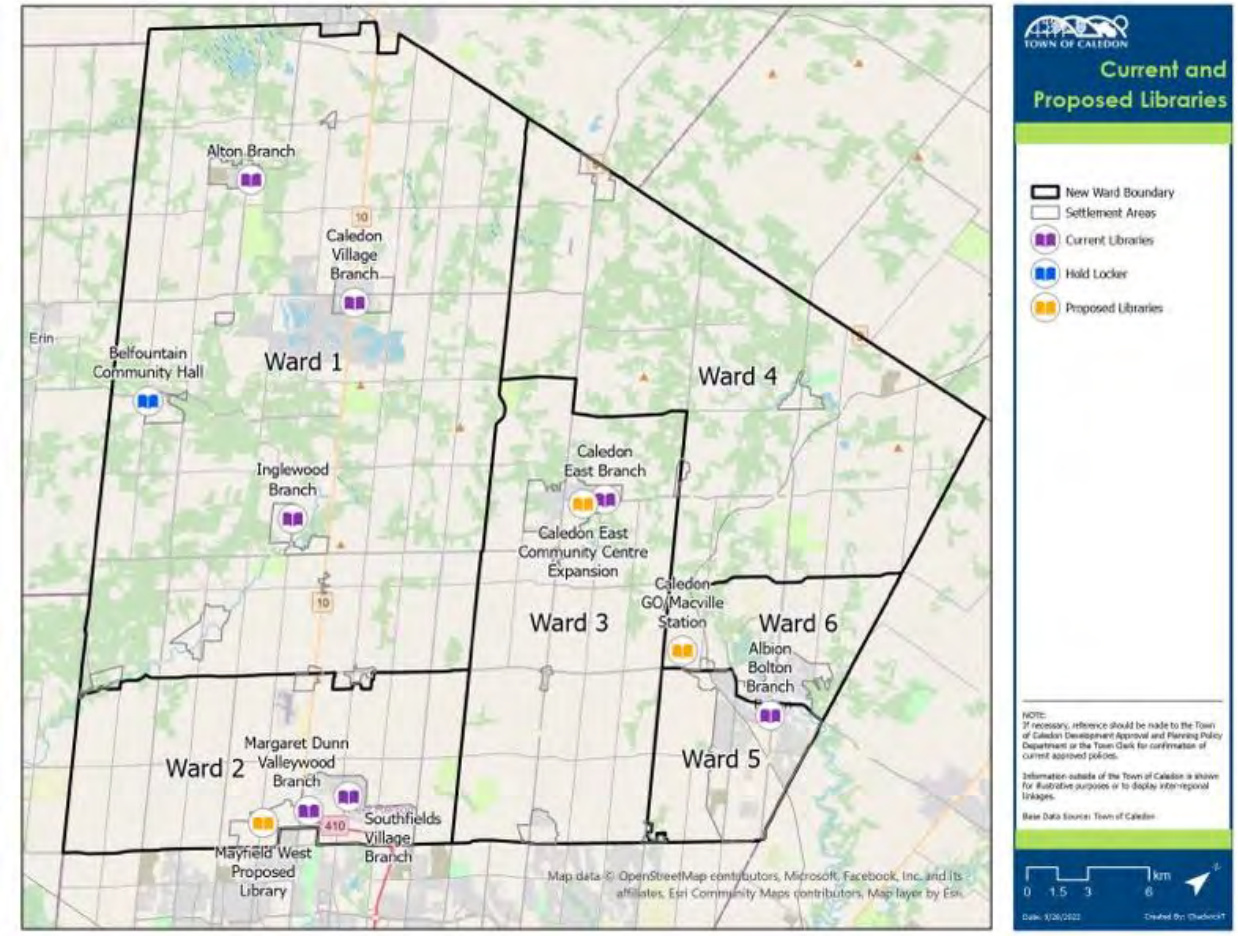
2.1. Demographic Projections of Growth

Caledon's population has been growing quickly in recent years and will continue to do so. Its population in 2016 was 66,502 and has grown by 15.2% to 76,581 in 2021. This compares with a growth rate of 5.8% for Ontario over the same period. This Comprehensive Growth Plan covers the next 20 years. However, it is interesting to review expected growth rates over the next three decades. According to data provided by the Town's Planning Department, Caledon's population will grow extremely rapidly over the next 30 years.

The Town currently projects that its population will be as follows:

Year	Projected Population
2021 (census)	76,581
2026	96,057
2031	111,992
2036	151,964
2041	200,996
2046	248,858
2051	300,000

For planning future library facilities, it is useful to review population projections on a ward basis. Caledon's ward map together with current and currently planned libraries is shown below:

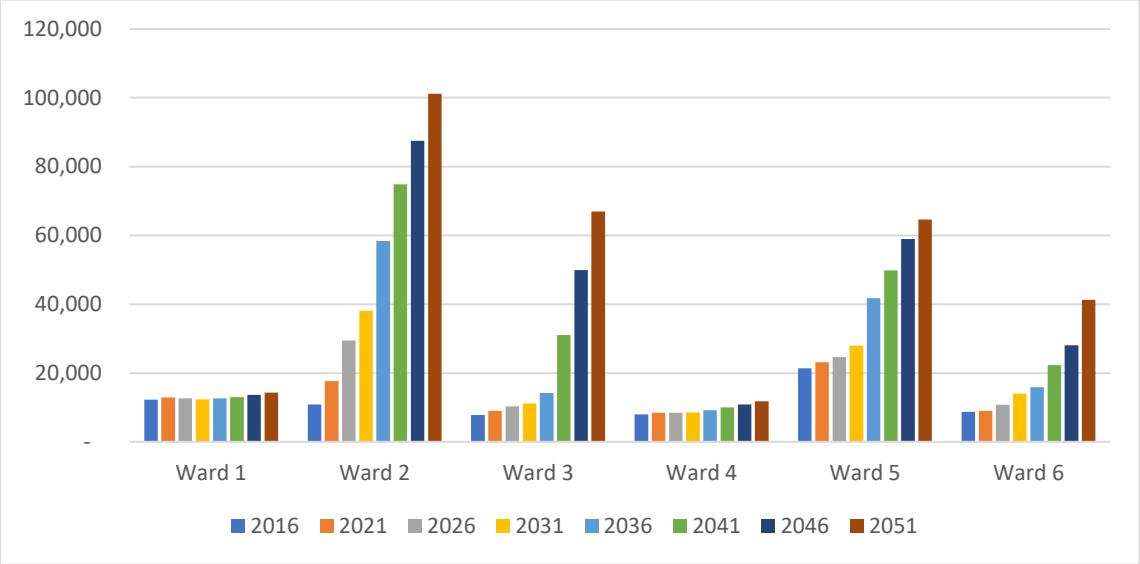


On a ward basis, the population projections are as follows:

Ward	2016	2021	2026	2031	2036	2041	2046	2051
Ward 1	12,275	12,884	12,579	12,330	12,591	13,038	13,645	14,275
Ward 2	10,893	17,632	29,449	38,098	58,415	74,829	87,477	101,135
Ward 3	7,756	8,992	10,305	11,101	14,176	30,991	49,876	66,938
Ward 4	7,926	8,407	8,432	8,492	9,160	10,014	10,887	11,769
Ward 5	21,396	23,114	24,579	27,942	41,724	49,866	58,906	64,595
Ward 6	8,719	8,969	10,723	14,029	15,898	22,258	28,067	41,288
Total	**68,965**	**79,998**	**96,067**	**111,992**	**151,964**	**200,996**	**248,858**	**300,000**

Note: There were slight variations in the Town's planning data compared with Census data for 2016 and 2021.

The chart below shows this expected growth visually for each of the wards up until 2051.

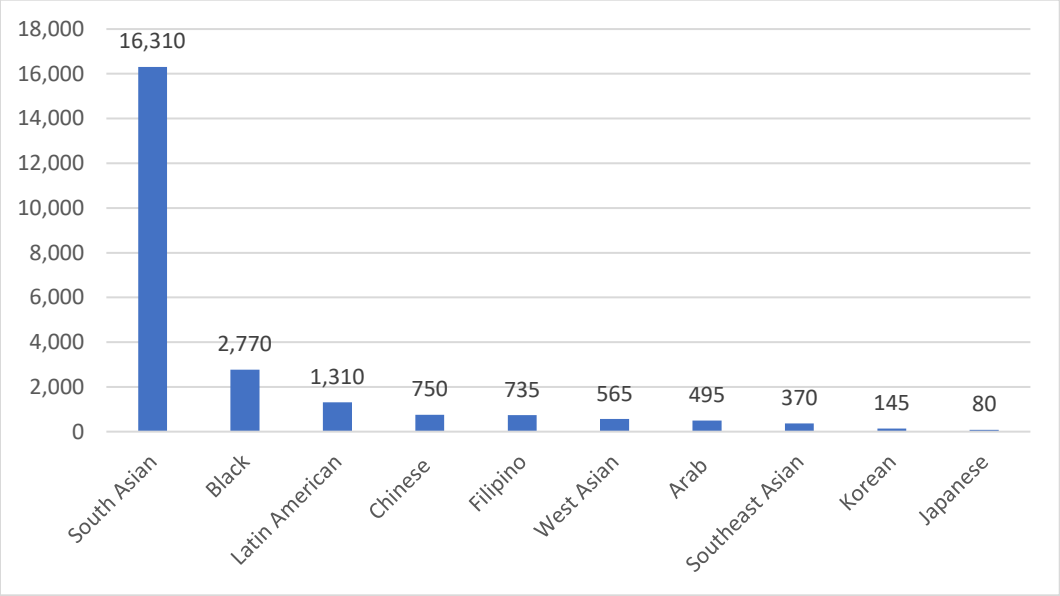


As shown by the charts, Caledon will experience dramatic growth in Ward 2 (Mayfield in the southwest), Ward 3 (Caledon East to the southern boundary), and Ward 5 (Bolton and southeast). Ward 6 (north part of Bolton) will also experience some growth. Wards 1 (northwest) and Ward 4 (northeast) are primarily rural and are expected to experience only limited growth over the next 30 years.

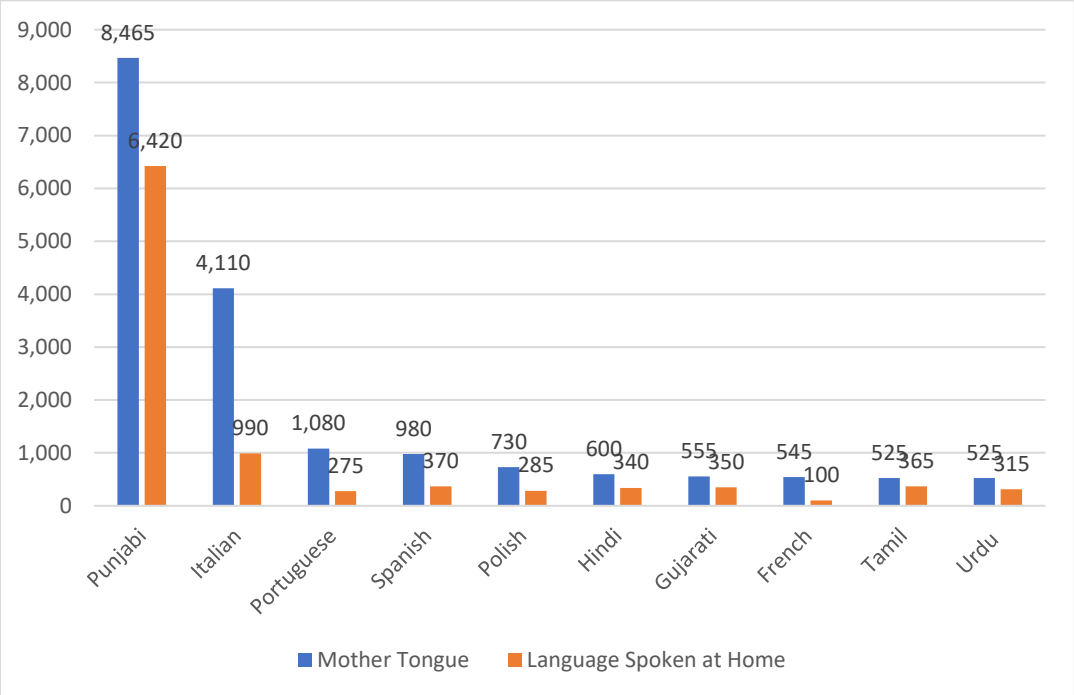
Compared with Ontario as a whole:

- Caledon is a relatively younger population with average age of 40.0 compared to 41.8 for Ontario.
- Caledon is quite wealthy with average household income (2020) of $155,400 compared to $116,000 for Ontario.
- Notwithstanding the above, Caledon also has some low-income residents. Its low-income measure after tax (a Statistics Canada calculation) was 4.5% of its population compared to 10.1% for Ontario.

Caledon also is experiencing changing demographic patterns with regard to different cultural groups. The chart below shows Caledon's largest visible minority groups as identified in the 2021 census.



The chart below shows all linguistic groups with more than 500 persons identifying a non-English mother tongue in Caledon 2021, sorted from high to low. For each language group, those identifying the same langue spoken at home is also shown.



It is likely that future residents of Caledon will continue to include large numbers of those from cultures and linguistic groups represented in the above charts, especially Punjabi speaking people and those from other parts of South Asia.

2.2. Psychographic (PRIZM) Analysis of Library Users

Overview

An analysis of the current active Caledon Library members[3] was undertaken to better understand their lifestyle and behaviour. (It should be recognized that 'active' library members do not represent all users of the library. For example, there are many users of the library who may not be cardholders, but who visit to browse collections, read periodicals, use computers, access the internet or attend programs [for which a library card is not required], and therefore are not considered to be an 'active' member as defined by the Ministry of Tourism, Culture and Sport.)

We utilized the Environics PRIZM system which classifies all of Canada's neighbourhoods and households into 67 unique lifestyle types. Each lifestyle type (a segment) describes the current demographics, lifestyles and values of people whose behaviours are broadly similar.

Every residential postal code across the country is classified as one of these 67 unique segments, depending upon which of the segments the majority of its households fall into. The segments link demographics, psychographics, shopping behaviour, leisure activity, media preferences and offer a comprehensive view of Canadian neighbourhoods at the postal code level.

The current 2021 Census shows Caledon having a population of 76,550 made up of 23,700 Households. We identified 5 key segments that make up 87% of all current Caledon Library members (i.e., 87% of the Caledon Library members live in postal code areas that have been assigned to those lifestyle types) as well as 91% of all Caledon households. These are shown below:

[3] The CPL file of 'active' members represented members as of 09/01/2022 who had been active for two years.

	TARGET Segment	PROFILE	# of MEMBERS	% of MEMBERS	# of HOUSEHOLDS (total Caledon)	MEMBER HHLD penetration	Avg HHS	Avg AGE
1	MODERN SUBURBIA	Suburban Diversity *Young Families*	3,189	31.61%	4,040	78.94%	$150,356	35
2	FAMILY MODE	Upper Middle Suburban *Middle Age Families*	2,081	20.63%	7,021	29.64%	$148,961	40
3	TURBO BURBS	Suburban Elite *Middle Age Families*	1,839	18.23%	4,845	37.96%	$209,727	47
4	KICK BACK COUNTRY	Upper Middle Rural *Middle Age Families*	1,203	11.93%	4,339	27.73%	$158,550	46
5	FIRST CLASS FAMILY	Suburban Elite *Large Diverse Families*	549	5.44%	1,319	41.62%	$164,349	39
			8,861	87%	21,560		$166,388	

We also identified which of these segments are within the closest proximity to a Library branch from their homes.

	TARGET Segment	PROFILE
1	MODERN SUBURBIA	Southfields Village Margaret Dunn Valleywood
2	FAMILY MODE	Albion Bolton
3	TURBO BURBS	Alton Albion Bolton Belfountain Lockers Inglewood Caledon East Caledon Village
4	KICK BACK COUNTRY	Albion Bolton
5	FIRST CLASS FAMILY	Southfields Village Margaret Dunn Valleywood

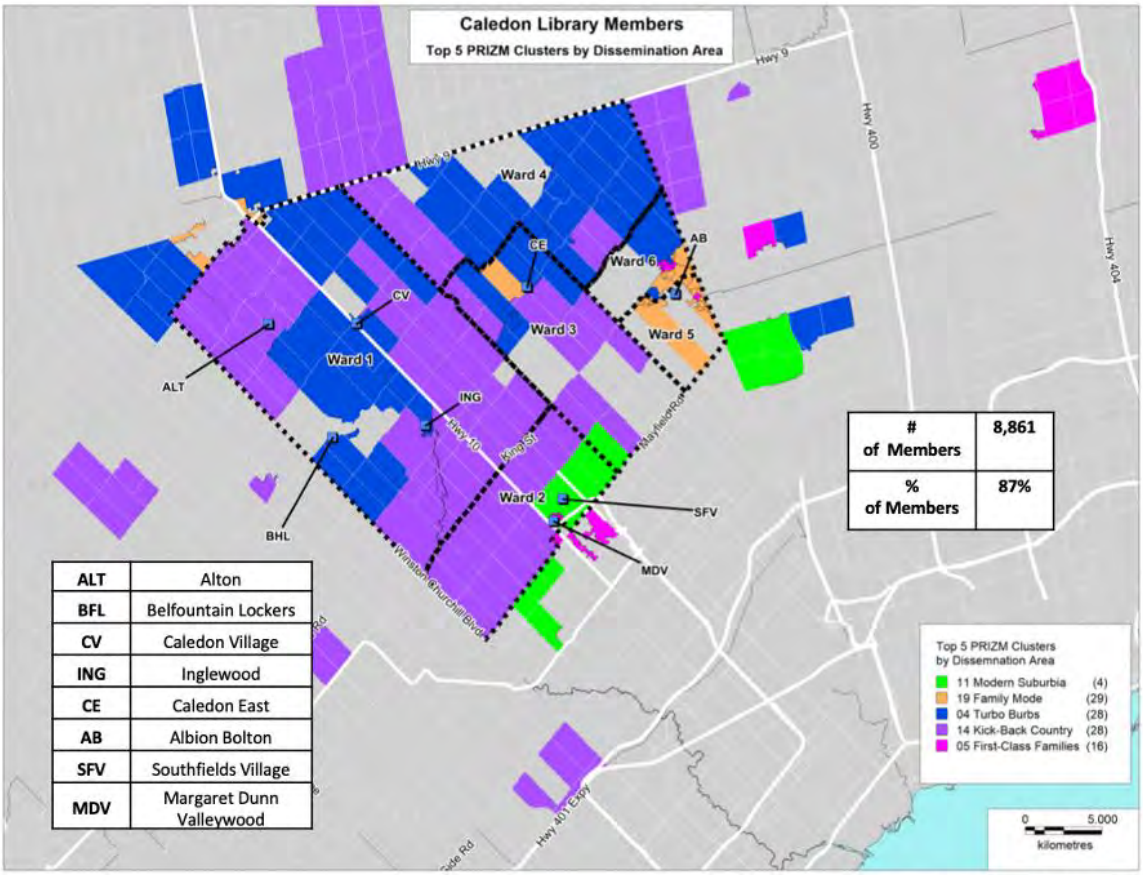
Source: Statistics Canada, Environics 2020

More detailed descriptions of each of the above profiles are presented in Appendix B.

These segments have a common type of family lifestyle:

- Ex-urban Suburbanites and Rural
- Straddle two worlds – close to the city but far enough way to feel like they are in the country
- Family first, 'kid-centric'
- Highly active and social

- Busy with diverse leisure activities
- Need to escape – discover, enjoy, explore and learn
- Desire for newness, freshness and excitement
- Enthusiastic consumers – wanting and spending
- Local community is important



Source: Statistics Canada, Environics 2020

Summary

There are currently 10,971 active Caledon Library members living in the municipality, which represent 14.3% of the total Caledon 76,550 population (2021 Census).

As a comparator, the average number of active cardholders in a typical Ontario Library system is 36% of the population based on the most recent Annual Survey of Public Libraries (2021) by the Ministry of Tourism, Culture, and Sport. For its annual survey purposes, the Ministry defines active cardholders as those who have used the library in the last two years. As noted above, this cardholder count may differ from CPL's list of members. Further, as with any library system, it should be recognized that there are many users of the library who may not be cardholders, but choose to use the facilities to browse, use computers, etc. Further, some

library systems require program users to become cardholders; others do not. For these reasons, there can be slight variations in how libraries count their active users.

Comparative branch systems to Caledon would include Brampton which has 18% of its population that are members and Halton Hills which has 34% of its population that are members of their local library system.

Based on the PRIZM segmentation the membership base lifestyle can be summarized in this way:

- The "suburban" and "rural" segments live very much an "urban country" type of lifestyle which is upscale
- The majority of members are FAMILY centric – from young to middle aged
- They have lots of children including teenagers
- They are well educated suburban groups with high incomes and are highly successful
- They are living well and enjoying the trappings of success
- In terms of occupation, they are primarily in management / white collar roles
- They are highly active and lead busy lifestyles – they are on the go and time-crunched
- They are keenly interested in a variety of leisure activities
- They are sophisticated in their lifestyle choices
- They are high media consumers of most traditional and digital media
- They are highly involved in their community
- The "Modern Suburbia" segment is highly ethnically diverse being made up of predominantly 1st and 2nd generation Asians and South Asians
- The "First Class Family" segment is also diverse but are 2nd generation Canadians from Greek, Italian, Mandarin and Polish descent

There are other segment groups that represent Boomer, Retired Senior and Lower-Income residents, but they make up a smaller percentage of the population and target segments. Clearly some targeted programming or services for those groups in the branches that they are closest to must continue to be recognized and provided in addition to the focus on the large and dominant "Family" target group.

Future Considerations

There is room for membership growth in all of the top 5 segments based on low - medium penetration rates in terms of the number of households in Caledon. With the majority of current members being "family segments", that lens should be applied to the development and strategies for future programming, services, marketing tools and outreach as well as Library design and space.

2.3. Review of Relevant Policies and Background Reports

The team reviewed a considerable number of background reports and policies as context for the development of the Comprehensive Growth Plan. In addition to the CPL Strategic Plan discussed in Section 1.2, a few of the key documents and their policies are outlined below.

CPL Strategic Action Plan – 2021 Year End Update provided the Board with a progress report on key actions in the Strategic plan.

Strategic Assessment and Evaluation Plan – provides quantitative measures, targets and timelines in connection with usage of Library services and collections.

CPL Library Service/Facility Review and Master Plan 2016 – This plan prepared by Lighthouse Consulting and LGA Architectural Partners reviewed population forecasts and Library branch capacity as it existed in 2016. The Plan developed a range of recommendations that addressed the shortcomings in the facilities and portfolio of programs that created barriers to success of the Caledon Public Library. Concept drawings and costings were developed for recommendations made at each of the branches. Some of the key recommendations included:

- **Albion Bolton branch** – major renovation
- **Alton branch** – short term renovation. In the longer term create a Village Hub in the northwest serving Alton, Inglewood and Caledon Village. The hub would potentially combine a Library with recreation and other community services
- **Belfountain** – should be closed
- **Caledon East** – return the existing branch to the school and move to the Caledon Community Complex
- **Caledon Village** – short term refurbishment followed by longer term closure and move to a Village Hub
- **Margaret Dunn Valleywood** – closure following establishment of Southfields and Mayfield West 2 as hubs in the southwest, or, retained as a digital hub that provides business, adult training and digital services
- **Southfields** – creation of a new 7,500 square foot branch in a hub aligned with other community services
- **Mayfield West 2** – creation of a new 20,000 square foot branch to be integrated into the Mayfield West 2 community centre
- **Caledon Northwest** – creation of a Village Hub somewhere in the northwest that would combine a larger library with recreation and community services, after which time Alton, Inglewood and Caledon Village branches can be closed and moved into the Northwest Village Hub.

In addition to the key reports identified above, the team reviewed a number of other CPL reports and documents including:

- Financial information including budgets and financial statements
- Quarterly library statistics and performance measures

- Various documents related to existing and proposed branches including site plans, floor plans, occupant loads, future plans for new facilities, etc.
- IT assessments and budget documents
- Public Surveys

Further, a number of relevant Town policies and documents were consulted including:

- Caledon Official Plan, Consolidated April 2018
- Future Caledon Official Plan (Caledon's draft OP for review)
- Map of Town owned land in Caledon
- Resilient Caledon – Community Climate Change Action Plan
- Caledon Growth Concept
- Development Charges Background Study (as Amended by Staff Report 2019-63 and Council Resolution), Town of Caledon, March 2019

The Town's Planning Department also provided population projections at the small geographic unit level that were aggregated into population projections for each of the six wards.

2.4. Key Stakeholder Interviews

Various key stakeholders were invited to provide input via interviews, an online survey and in-person meetings. More than 20 individuals took part in the project, in addition to the Caledon Library Board.

Strengths

Stakeholders' overall impression of the Library system is very positive. They have a favourable view of the Library's services for elderly people, children, and people with special needs and all praised CPL staff highly. They also noted the quality and breadth of programming, in particular Seniors' Tech, Afternoon in the Garden events and a Bolton history display. CPL's role in providing good Wi-Fi for homework is also clearly important.

Priority: Extended hours

The majority of stakeholders specifically mentioned the need to make library services available on weekday evenings and on Sundays. At a minimum, they encouraged finding a way for customers to pick up holds when the library is closed. Some framed it as an accessibility issue, others as a way to draw working parents and commuters.

Weaknesses

Some respondents noted that the library has difficulty attracting enough qualified staff and does not receive adequate funding.

About one-third of the stakeholders identified inadequate promotion of the CPL's resources as a problem, while stressing the value of the Library to community-building. They called for more

engagement with the CPL's existing social media following, as much on-site programming as possible at Southfields Village, and making sure that as many people are aware of the Library-of-Things offerings.

Reaching new people, strengthening ties

Given the prevalence of online communication, it is interesting that several respondents praised the Library's printed materials, especially for reaching people who do not speak or read English. Translating the CPL's current flyers into other languages and sharing them through non-English newspapers, Meals-on-Wheels, Punjabi Health Services, and Mayor Groves' proposed outreach effort could all be useful.

Groups worth focusing on included: newcomers, men, boys, adults aged 35-60, entrepreneurs and non-profit organizations, and remote workers.

One respondent raised the question of configuring the CPL catalogue or website to propose ways to access other community organizations, when a given book is checked out or a search term is entered. For example, could checking out a book about child nutrition prompt a link to resources such as EarlyON. In theory, SirsiDynix does offer a module that could support this, though other ILS's do a better job of integrating community profiles. The suggestion may also be counter to Library privacy policies so would need to be considered carefully within the context of the request.

Changes to branches

There is also strong support for a bookmobile as a way to provide services to the many groups that cannot easily get to a branch. There was some interest in holds lockers and kiosks.

Board members noted that when the Belfountain holds lockers were installed, people started to use the Caledon Village and Alton branches rather than stop using the libraries. The Board was the only group of stakeholders that regarded the consolidation of smaller branches in Ward 1 as potentially a valuable way to redistribute budgetary resources and staff time. All others were opposed to making the attempt.

Caledon is moving towards a net zero building policy[4] and examining ways to finance it, while also trying to make public facilities more energy efficient. Mayor Groves supports this shift on its own merits, and as an important way to distinguish Caledon from the rest of the GTA's sprawl.

Several respondents commented on Caledon's large commuting population. CPL could make an effort to include spaces and services for commuters at new branches near future GO stations.

[4] *i.e., constructing buildings that generate sufficient energy through renewable means that their net energy footprint is zero – the amount of energy they generate is enough to completely operate the building.*

A number of respondents mentioned the outdoor space at Southfields Village. Clearly, it has already gained a good reputation.

Partnerships

There is plenty of appetite for working with the Library. Every stakeholder interviewed expressed strong interest in partnering. Some recalled past joint efforts that worked well, others proposed new venues, for example a 'young entrepreneur' program with the Caledon Chamber of Commerce. This is a testament to the CPL's management team and staff – they create welcoming, positive space that is in high demand.

There is definitely interest in being able to use Library space on evenings and weekends, to be able to rent rooms and meeting space. (Service clubs, peer-support groups, speaker series, hobbyists, etc.) There is also interest in using Library space for hosting pollinators, collecting special kinds of waste and/or recycling, and displaying historical artifacts and documents.

Avoiding duplication of services is a goal for several stakeholders. Conversely, many stressed the value of cross-posting, of service providers actively sharing each other's information.

2.5. Review of Community Survey Results

Overview

A confidential survey of the community giving all Library users as well as the general public the opportunity to participate in the Comprehensive Growth Plan study was undertaken.

One goal was to understand the reasons why non-library users are not using or only rarely using library services. In addition, it was important to determine whether non-users have any interest in using new library facilities and whether new facilities would convert them to library users.

The survey also requested that library users share their opinions regarding their use of the library, views on services such as collections, information services, programs, technology needs, facility needs, difficulty accessing the library, possible need for a new branch, etc. As a result, a very impressive 1042 responses were obtained, providing a very representative view of the community.

Key Statistics

Respondent Profile

Highlights of this survey were:

- 1,042 responses

- 91% lived in Caledon; 9% outside (about half of these from Brampton)
- all Wards represented: highest: Ward 2 (203 responses); lowest Ward 6 (74 responses)
- all age groups represented: from 12 and under (30 responses) to 85+ (4 responses); highest group 25 – 34 with 201 responses
- all income ranges represented: under $25K (18 responses) to $200K+ (69 responses) – 29% chose not to answer
- 69% of respondents identified as female
- cultural background:

Affiliation	Survey Result	2016 Census, Caledon	2021 Census, Caledon
White (Not visible minority)	70.3%	81.3%	67.1%
South Asian	13.4%	10.0%	21.4%[5]
Black	3.7%	2.8%	3.6%
Chinese	2.8%	1.0%	1.0%
Filipino	2.6%	0.8%	1.0%
Latin American	2.5%	1.4%	1.7%
Japanese	1.7%	0.2%	0.1%
Korean	0.9%	0.2%	0.2%
Southeast Asian	0.8%	0.3%	0.5%
West Asian	0.8%	0.4%	0.7%

- household status: most couples with dependent children: 38%; couples without dependent children 24%; single adults 15%
- of the 38% with dependent children: 68% have children 12 or under; 39% have teens (implies that only 7% have children 12 or younger **and** teens)
- most respondents (48%) full-time employed
- travel mode: 58% own car or truck
- travel time to a library branch: 53% less than 10 minutes

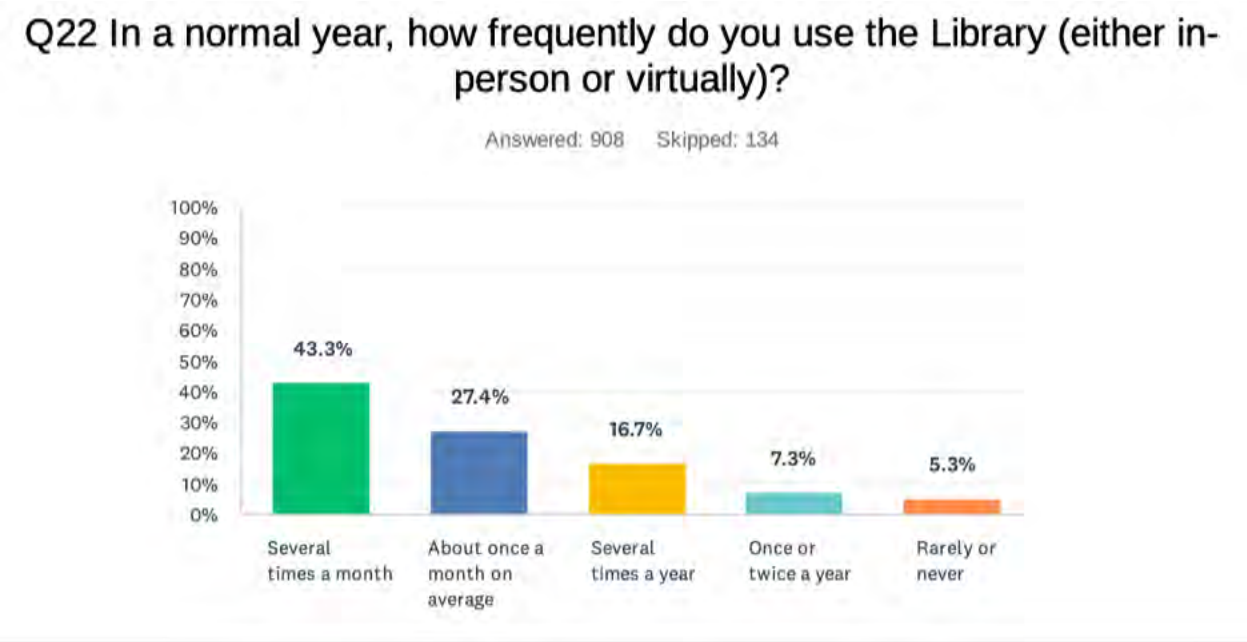
[5] Note incidentally on this table the very high growth in this cultural group as a percentage of overall population between 2016 and 2021.

- home Wi-Fi: 61%: reliable, high speed; only 5% non-existent

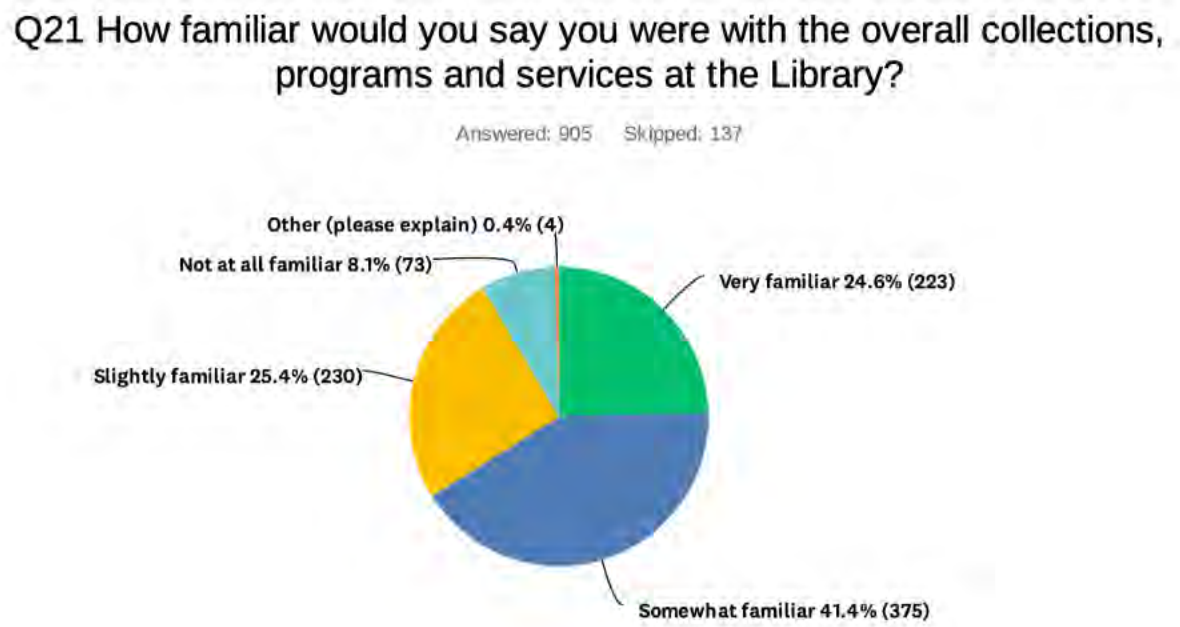
- devices: 79% smart phone; 74% own laptop; 61% iPad or equivalent

- languages other than English & French spoken and understood:
  - *Spanish 18%*
  - *Punjabi: 18%*
  - *Italian: 17%*
  - *Hindi: 14%*
  - *Croatian: 10%*

Library Usage



- While the majority of respondents have a Library card, familiarity with the overall offering (programs and services) is low with only 25% indicated they are very familiar



- need for services in other languages (responses)

Language	Print Materials	Online Resources	Programming in Language
Spanish	34	33	25
Punjabi	32	33	33
Italian	28	25	20
Hindi	19	22	25
Croatian	17	20	15

- need for French-language services? 105 responses to question: yes: 45 responses; no 29 responses; not sure: 51 responses) – no

- 87% hold a Library card

- 37% member of another Library system: Brampton most common

- familiarity with system: 25% very familiar; 8% 'not at all familiar'

- branch use: several times a month

  - ***Virtual / Online: 27%***
  - *Albion Bolton Branch: 18%*
  - *Southfields Village: 15%*
  - *Caledon East Branch: 13%*

- *Margaret Dunn Valleywood: 8%*
- *Caledon Village: 6%*
- *Alton: 6%*
- *Inglewood: 5%*
- *Belfountain Holds Lockers: 3%*

- comments on branches

  - *Albion Bolton Branch: 230 comments*
  - *Southfields Village: 165 comments*
  - *Caledon East Branch: 188 comments*
  - *Margaret Dunn Valleywood: 136 comments*
  - *Caledon Village: 127 comments*
  - *Alton: 140 comments*
  - *Inglewood: 105 comments*

- What would cause you to become a more frequent user?

  - *More knowledge of what's in the Library: 38%*
  - *Better marketing so I'd know what's going on: 36%*
  - *Opportunities to socialize with friends at the Library: 23%*
  - *Programs that are more attuned to my interests: 20%*
  - *I'm reluctant to use the Library because of Covid: 14%*
  - *Improved layout or orientation of the space: 11%*
  - *Collections that are more attuned to my interests :9%*
  - *More collections or programs in a language other than English: 9%*
  - *Need someone to drive me to the Library: 9%*
  - *Public transportation to the Library: 7%*
  - *I'm not interested in using or visiting the Library: 7%*
  - *Change in the hours of operation:7%*

- interest in alternative service delivery

  - *Extended access: 45% (i.e., open access)*
  - *Bookmobile: 37%*
  - *Off-site holds lockers: 37%*
  - *Off-site book kiosks: 36%*

- online resources: 29% chose to comment

  - Usage:
    - *Hoopla: 41%*
    - *Overdrive / Libby: 38%*
    - *Ancestry 18%*

    - *Kanopy: 16%*

    - Ease of access: 66%, relatively easy; 23% somewhat difficult

- the majority of users currently get information about the Library via the website followed by the electronic newsletter
    - *website: 65%*
    - *eNews: 32%*
    - *word of mouth: 26%*
    - *Facebook: 24%*
    - *Library staff: 21%*
    - *Instagram: 12%*
    - *Twitter: 10%*
    - *'traditional' channels: 10%*

Note that **Appendix A** contains the major themes contained in open-ended comments from the community survey.

2.6. Board Workshop

A workshop with the Board was held August 15, 2022. The team gave a brief presentation of the progress to date and followed up with a discussion of several key issues.

Market Segments, Groups Served

The Board had a variety of comments:

- Variety and depth of online resources reaches teens and children effectively
- CPL's role in providing good Wi-Fi for homework is important
- Outreach to the South Asian community around the Southfields is better than it was, due to marketing during the pandemic.
- Service for customers with developmental disabilities was better pre-pandemic because there were volunteers to help. Restarting those partnerships/programs would help.
- Reaching adults age 35-60 is difficult, a time-strapped group
- Local entrepreneurs and businesses are a target group the Board wants to serve well
- Lack of public transportation is a barrier that CPL is not equipped to resolve, but it does affect service.

Locations and Facilities

The Board approved of TCI Management's not trying to focus on the branches that have recently been built or renovated, or that are scheduled for major capital improvements in the near future (Albion Bolton, Southfields Village, Caledon East and Margaret Dunn Valleywood).

When TCI described Alton, Caledon Village and Inglewood as in need of a 'refresh,' the Board members agreed and described a number of shortcomings. Members noted that size and age of these branches are all problematic. It was noted that at Alton, library staff can book the community room free of charge, but that at Inglewood and Caledon Village, the Library must pay the non-profit rental fee to the Town.

They described possible longer-term amalgamation of the three branches into one new branch, and if so, the need for 'an exit strategy' and a way to provide as much equity of service as possible.

With regard to partnerships, the Board noted that new Caledon Community Services (CCS) buses have begun to serve some areas of Caledon, including a recreation centre. It could be interesting to explore whether these buses could serve the libraries somehow.

They also stressed the need to plan for the huge projected growth around Mayfield West.

Future Planned Branches

The Board was enthusiastic about exploring technologies that could extend library access, including those that extend public access beyond staff hours. Bookmobiles and holds lockers are of interest and could perhaps be extended to locations without a library branch, such as Palgrave or Mono Mills.

There are ambitions for a performing arts centre at the Caledon GO/Macville location, which could work well with a library. This location is likely to serve commuters, so hours and programs for before and after the 9-5 workday will be important.

Accessibility is an important consideration, and the Board would like to provide quiet spaces.

Future Priorities

Each Board member was asked to name their highest priority for the CPL, the members individual responses included (in no particular priority):

- The importance of green initiatives was emphasized
- The relationship with the municipality could be strengthened
- The importance of accessibility at all levels (e.g., equity, inclusion, not just physical accessibility)
- Enough staff to provide programming and make resources available
- Availability of resources. Extended hours, electronic resources
- Establishing the libraries as appealing social and community spaces. For example, the Southfields outdoor spaces are inviting from outside. Distinctive indoor spaces can also help establish the library in the community imagination via social media.

- Continued focus on expanding accessibility and inclusion
- Responding to population growth
- Meeting the needs of entrepreneurs and not-for-profits, remote workers. For example, with meeting spaces and targeted collections.

2.7. Staff Survey Findings and Implications

In the summer of 2022, a ***confidential*** survey of all staff was undertaken in order to obtain their perspectives on the various issues to be dealt with by the Comprehensive Growth Plan. In total, 42 responses were received, representing a response rate of 70% of the 60 staff members (27 full-time and 33 part-time). Most (85%) of the full-time staff responded whereas only 45% of the part-time staff did.

Reported below are the major quantitative findings that are most relevant to this Comprehensive Growth Plan. There were a large number of specific comments made that related to additional program and service suggestions. A summary of these findings and more detailed comments has been passed along to management (ensuring that any comments that might identify specific staff members have been removed).

General Profile of Respondents

- response was very representative across all staff departments: 17% of responses were from 'Management and Administration' and 48% were from 'Public Service'

- response was also very representative across the branches, with staff having worked in all of them (the lowest response in this regard was Alton, with 63% or respondents reporting having worked there)

- many staff (32%) were relatively new (2 years or less); only 5% (representing 2 respondents) were 'over 20 years'

- most respondents had higher education, but only 4 (10%) reported having specialized library training such as OPS Excel or APLL

- most respondents (69%) reported the Albion Bolton Branch as their 'usual' work location

Satisfaction with the Branches: Respondents were asked to rate each of the branches in terms of their degree of satisfaction with various aspects of the physical facilities. The table below summarizes what respondents felt were the most satisfactory, and least satisfactory, aspects of the physical space at each branch.

Branch (and number of respondents)	Most satisfactory - % saying 'Entirely Satisfactory'	Least satisfactory -% saying 'Completely Deficient'
Albion Bolton (23, who were familiar with the new space)	- *Parking (74%)* - *Welcoming nature of space (70%)* - *Hours of operation (65%)*	- *Public transit access (30%)* - *Creative spaces (27%)* - *Amount of meeting space (13%)*
Alton (10)	- *Parking (80%)* - *Welcoming nature of space (56%)* - *Signage and visibility (50%)* - *Washrooms (50%)* - *Finding materials in the collection (50%* - *Wireless access and connectivity (50%)* - *Computer workstations (50%)*	- *Public transit access (60%)* - *Amount of meeting space (40%)* - *Creative spaces (30%)* - *Amount of programming space (30%)*
Caledon East (12)	- *Computer workstations (67%)* - *Finding materials in the collections (64%)* - *Internal accessibility and ease of getting around (58%)* - *Collections held at the Branch (58%)*	- *Public transit access (58%)* - *Amount of meeting space (33%)* - *Creative spaces (25%)*
Caledon Village (9)	- *Parking (67%)* - *Finding materials in the collections (67%)* - *Hours of operation (56%)* - *Computer workstations (57%)* - *Signage and visibility (44%)* - *Internal accessibility (ease of getting around) (44%)* - *Collections held at the Branch (44%)* - *Wireless access and connectivity (44%)*	- *Public transit access (44%)* - *Amount of meeting space (22%)* - *Creative spaces (22%)* - *Amount of programming space (11%)*
Inglewood (8)	- *Parking (71%)* - *Internal accessibility (ease of getting around) (57%)* - *Welcoming nature of the space (57%)* - *Finding materials in the collections (57%)* - *Collections held at the Branch (57%)* - *Signage and visibility (47%)* - *Washrooms (47%)* - *Wireless access and connectivity (47%)* - *Computer workstations (47%)*	- *Public transit access (71%)* - *Amount of meeting space (57%)* - *Creative spaces (29%)*

Margaret Dunn Valleywood (5)	- *Parking (60%)* - *Internal accessibility (ease of getting around) (60%)* - *Welcoming nature of the space (60%)* - *Collections held at the Branch (60%)*	- *Public transit access (60%)* - *Creative spaces (40%)* - *Office and administrative space for staff needs (20%)*
Southfields Village (14)	- *Internal accessibility (ease of getting around) (100%)* - *Welcoming nature of the space (100%)* - *Parking (87%)*	- *Creative spaces (21%)* - *Amount of meeting space (57%)*

Need for new branches in the community: Only 35% of staff felt there was a need for new branches in the community, while 14% felt there was not. The majority of respondents (51%) were 'not sure'. For those 14 staff seeing a need for new branch(es) the most popular choice was Ward 2 (57% of those staff feeling a new Branch is needed), followed by Ward 4, with 36%. Ward 6 was mentioned by 4 staff members (29%). All other Wards (1, 3 and 5) were mentioned by 3 staff (21%).

Need for alternative service delivery: More than half of all respondents felt that there was a need for some kind of alternative service delivery of library services (25 respondents, or 59%). The most common types of services in this regard were:

Type of Service	***Number of Staff Endorsing***	***% of all Respondents***
Off-site holds lockers	*18*	*40%*
Off-site kiosks (like a vending machine with books)	*15*	*33%*
Bookmobile	*12*	*27%*
Extended access to library spaces beyond regular hours of operation	*12*	*27%*

How well groups in the community are being served: Generally, respondents felt that groups in the community were being well served with Library programs and services, as shown in the table below (the yellow highlight shows groups where more than 50% of those responding to the question felt the group was well served). Groups warranting particular focus for additional services or programs based upon this analysis would appear to be newcomers to Canada; persons with special needs; local businesses (if deemed a group to whom the Library might provide special services); and the LGBTQ+ community.

Groups in the Community	*Number Commenting on Group (i.e., removing those who responded 'Can't Say / Don't Know)*	*% Saying 'Very Well Served'*	*% Saying 'Not Well Served'*
Families with young children	*31*	*90%*	*0%*
Seniors	*30*	*80%*	*0%*
Teens and youth	*29*	*79%*	*0%*
Recent Retirees	*27*	*70%*	*7%*
LGBTQ+ community	*31*	*52%*	*10%*
BIPOC community (Black, Indigenous, People of Colour)	*31*	*52%*	*6%*
Newcomers to the Community	*31*	*45%*	*6%*
Persons with special needs	*29*	*48%*	*14%*
Homebound or shut-ins	*16*	*75%*	*6%*
Local businesses and entrepreneurs	*17*	*53%*	*12%*
Newcomers to Canada	*30*	*27%*	*17%*

Materials in other languages: Just under half of respondents (22 respondents, or 49%) felt that there was a need for more materials in the French language. As well, recognizing the increasingly multicultural composition of the population, respondents were asked about the need for collections, programs and services (online as well as in-Library) in other languages as well:

*Language**	*Number Saying 'Yes there is a need'*	*% of All Respondents (45)*
Punjabi	*28*	*62%*
Hindi	*26*	*58%*
Italian	*18*	*40%*
Spanish	*12*	*27%*
Portuguese	*9*	*20%*
Polish	*7*	*15%*
Tagalog	*7*	*15%*
Croatian	*7*	*15%*
German	*4*	*9%*
Greek	*4*	*9%*

** Note: these are the most frequently spoken languages in Caledon not considering English or French*

Staff Having the Tools they Need: Most staff responding to a question asking whether they had the technology and training they needed in order to work effectively indicated that they did (97%). However, 10 respondents chose not to respond to this question.

2.8. Benchmarking Assessment

Ontario's public libraries report usage and related statistics to the Ministry of Tourism, Culture and Sport 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[6].

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, community survey, and staff surveys.

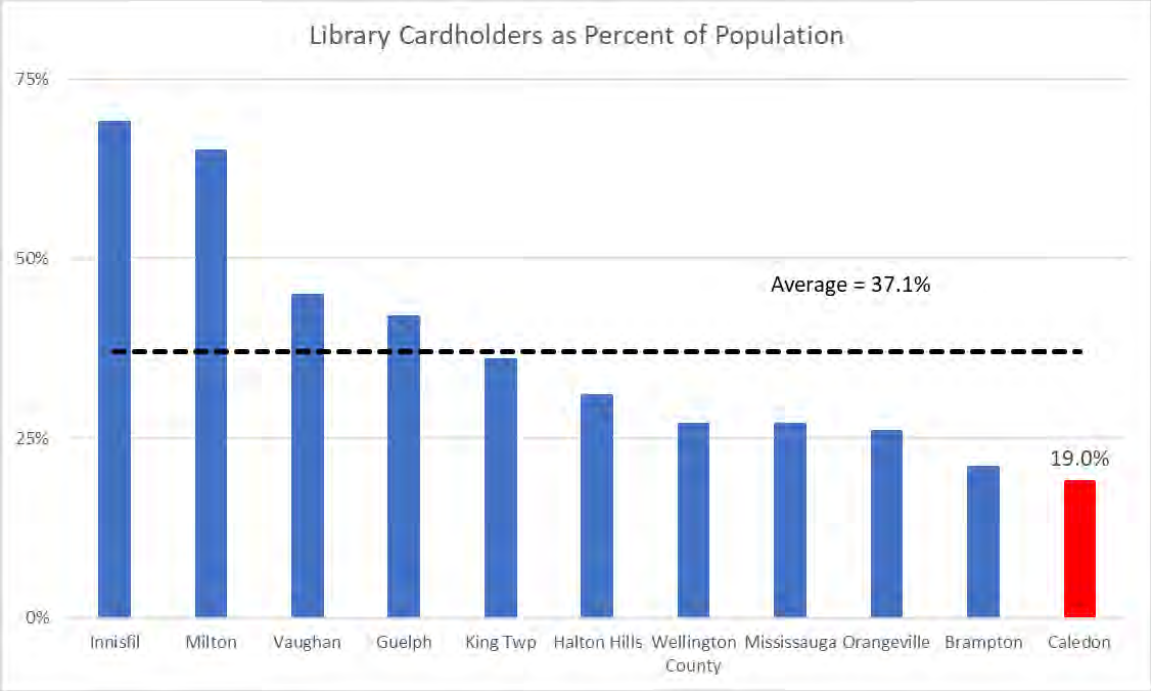
The "per capita" measure uses the population of the municipality and does not include residents of other municipalities who may use the libraries through reciprocal borrowing agreements.

The public libraries selected as comparators include:

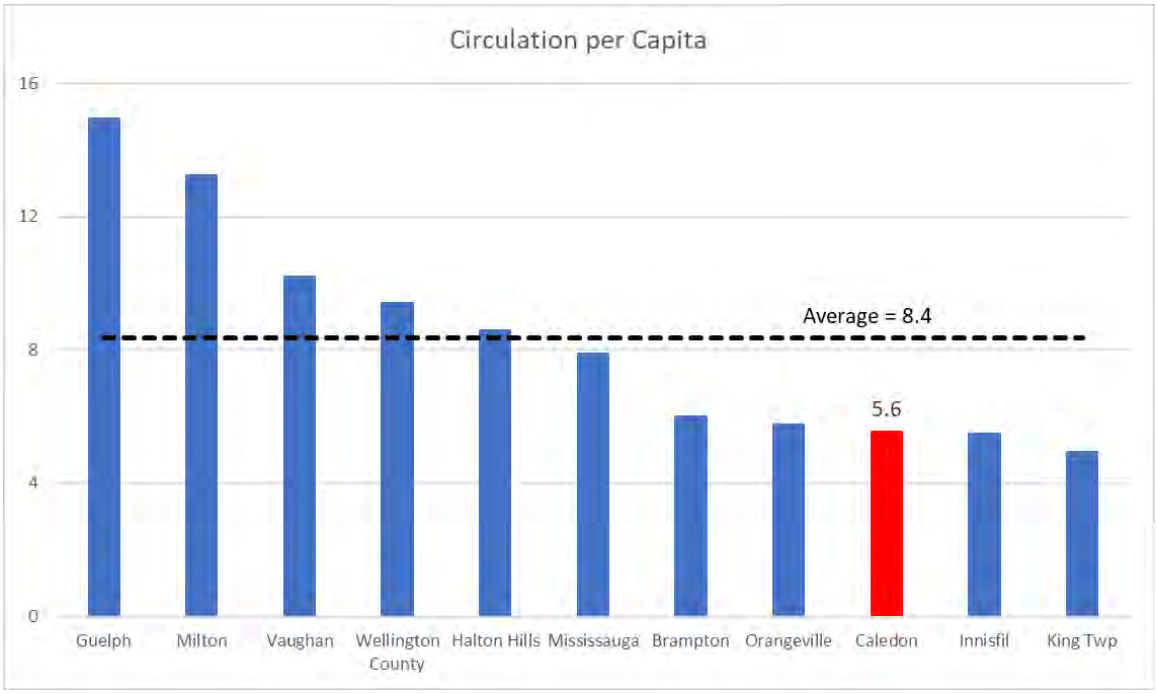
Brampton	Milton
Guelph	Mississauga
Halton Hills	Orangeville
Innisfil	Vaughan
King Township	Wellington County

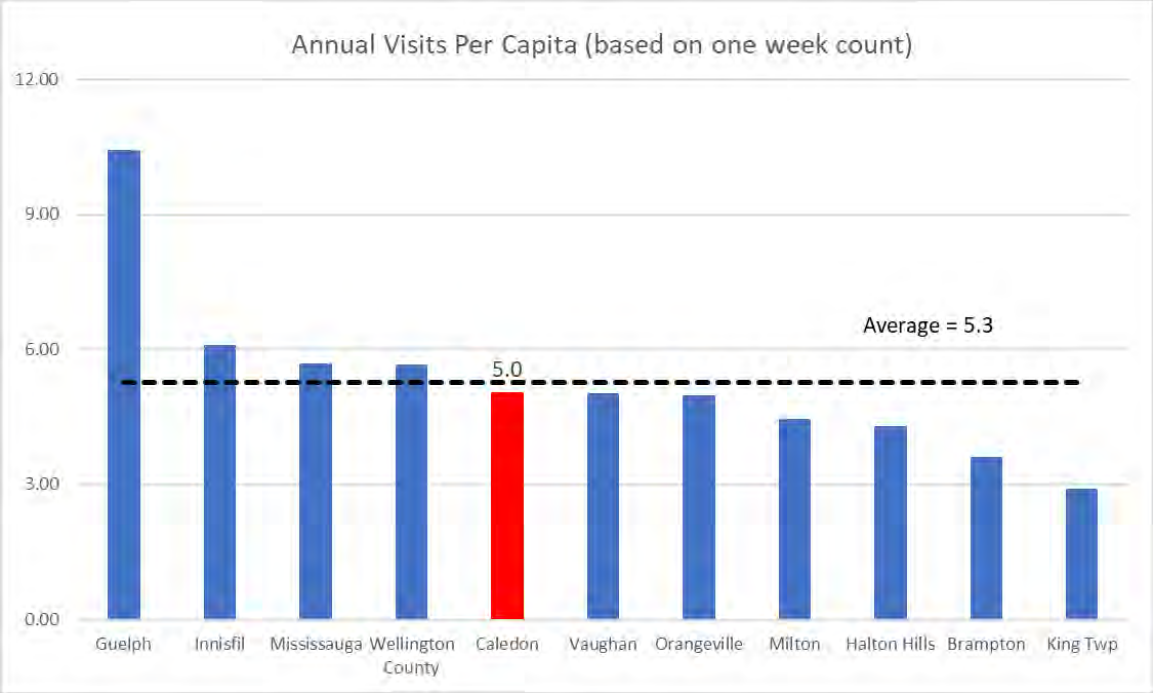
Generally, benchmarking compares community use of the libraries, as demonstrated by the percentage of the residents who have active library cards, as defined by use within the past two years, and the visits to the library. Charts use "per capita" to allow for variations in population by standardizing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

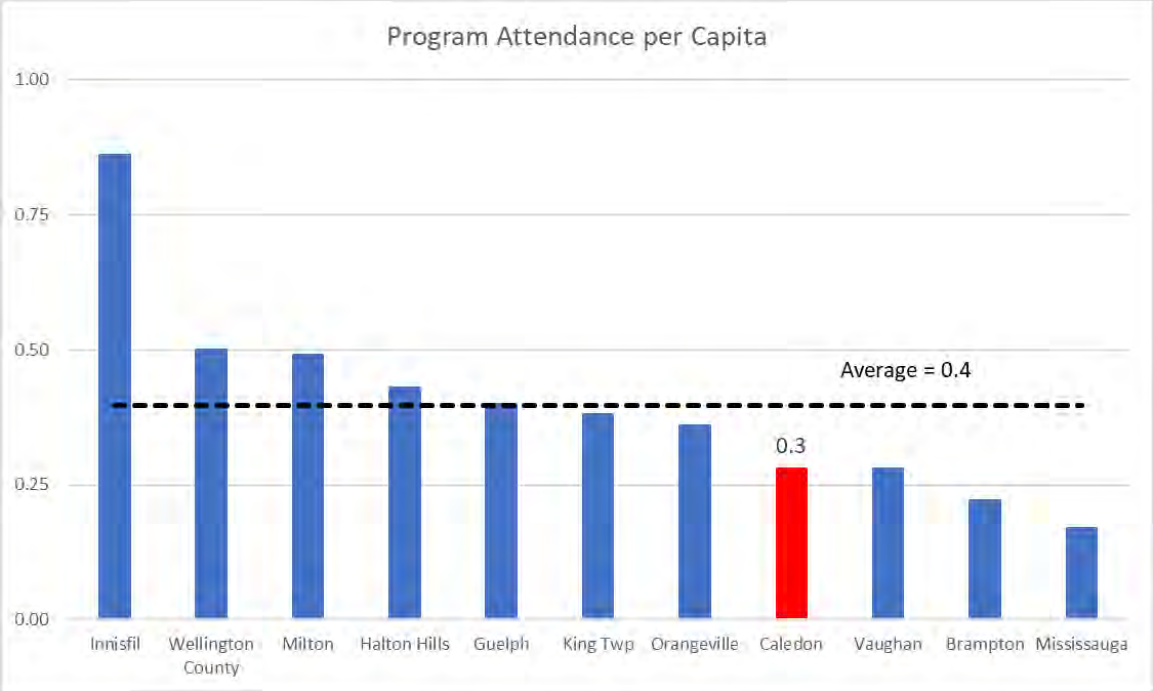
[6] *Data from Ontario Ministry of Tourism, Culture and Sport, Ontario Public Library Statistics, see: http://www.mtc.gov.on.ca/en/libraries/statistics.shtml Note that for Caledon, this data does not reflect the new Southfields Branch which was just opened in September 2020.*



Note that some libraries have automatic renewal of library cards or require library cards to attend programs. Libraries are required to report the number of active cardholders, defined as having been used within the past two years at the time of reporting.

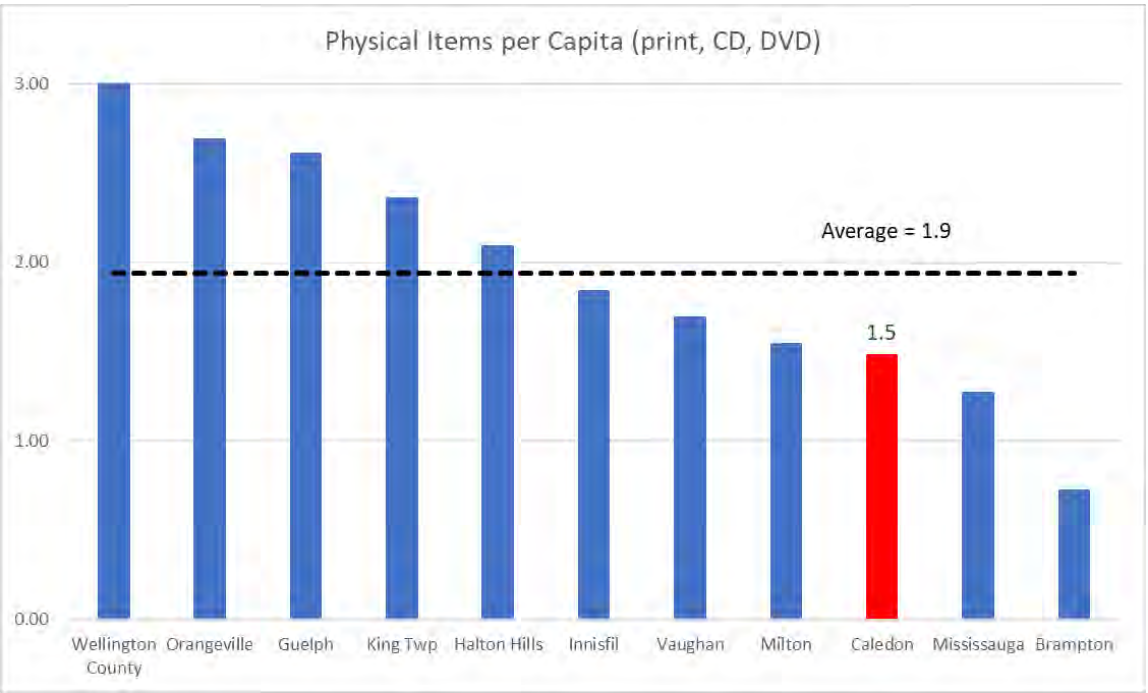


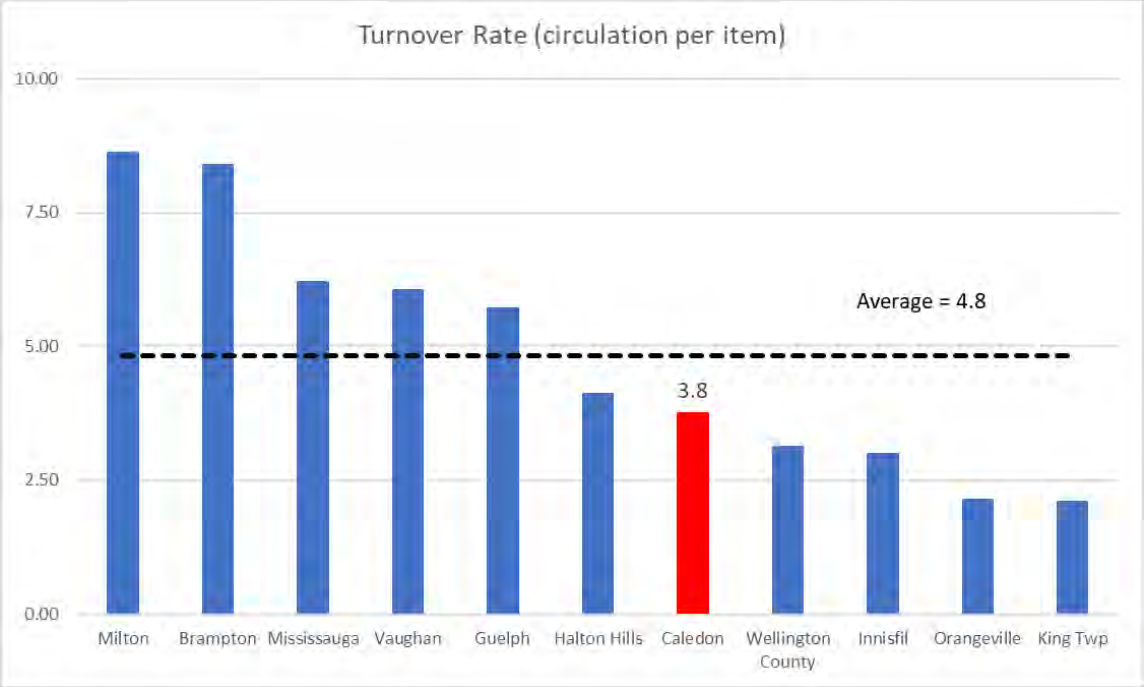




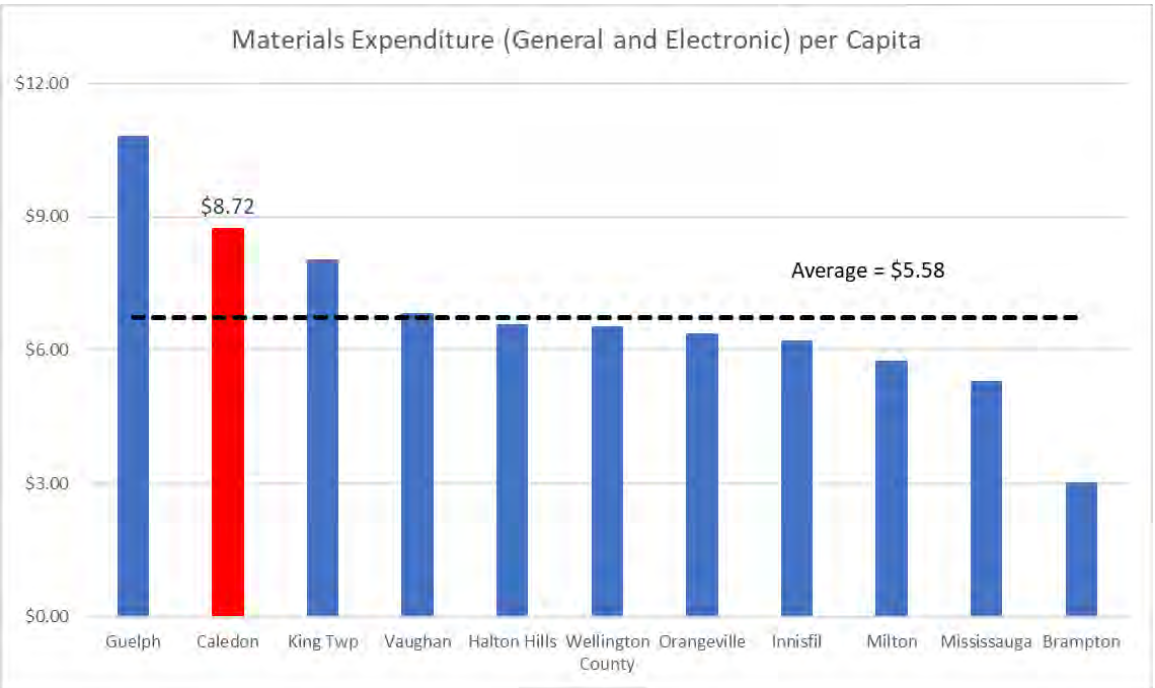
The above charts indicate that Caledon is below its peer libraries in terms of use by the community.

The following charts indicate the resources available at the Caledon Public Library.

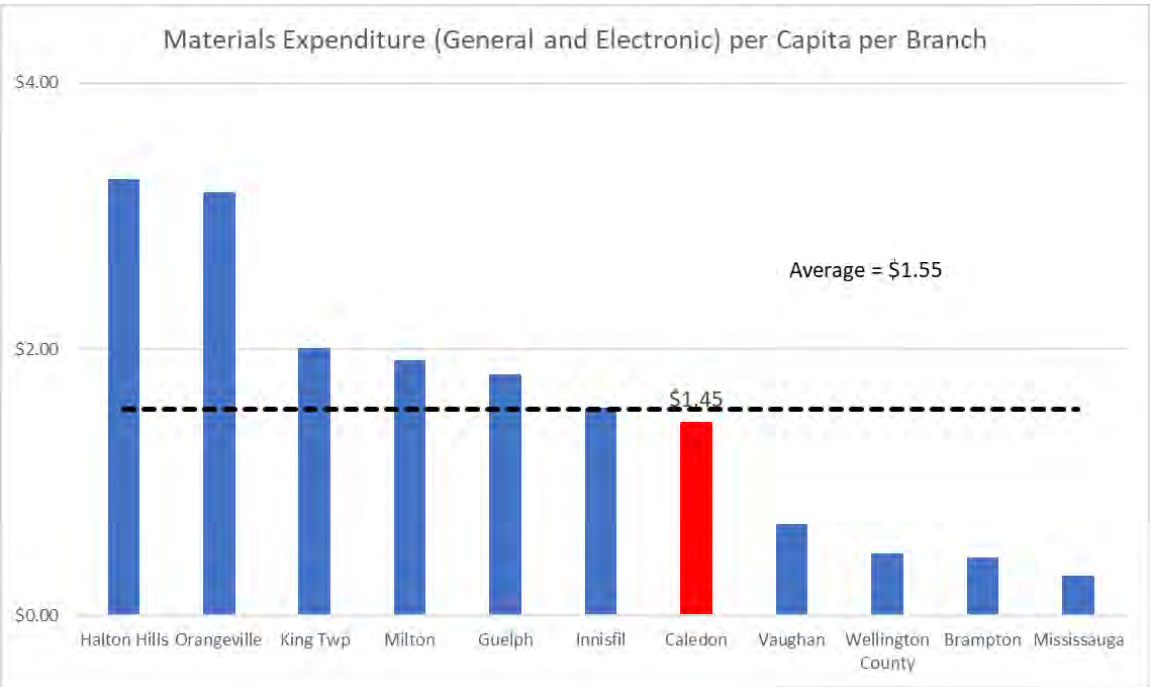


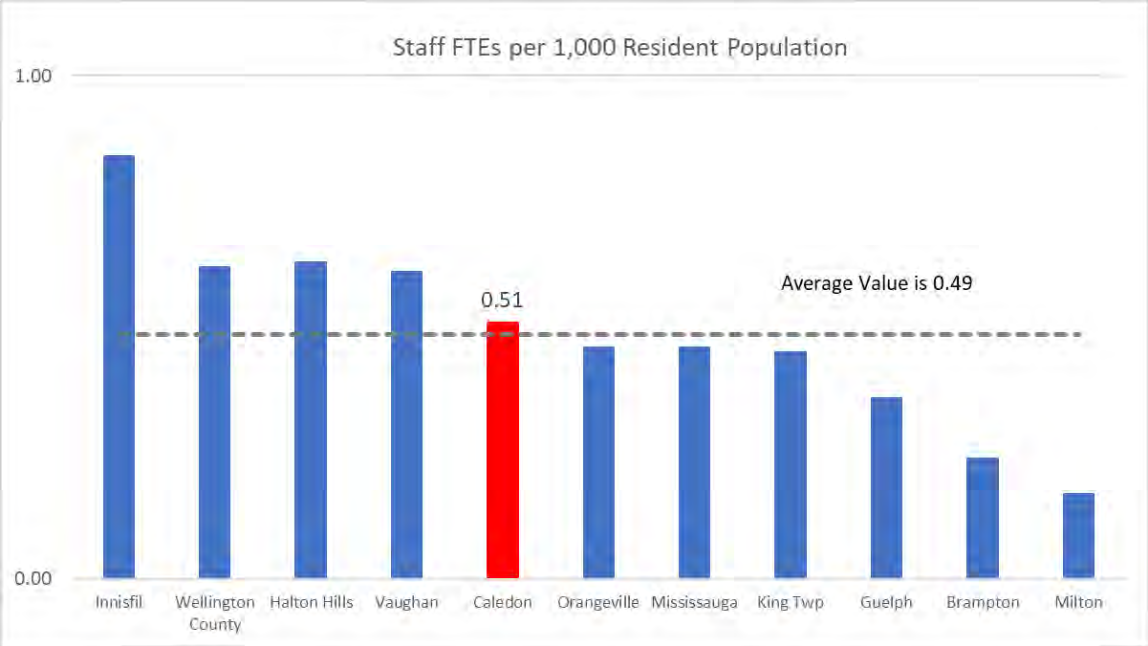


The turnover rate is a measure of the popularity of the collection (i.e., the average number of times a physical item in the lending collection is lent out over the course of the year).

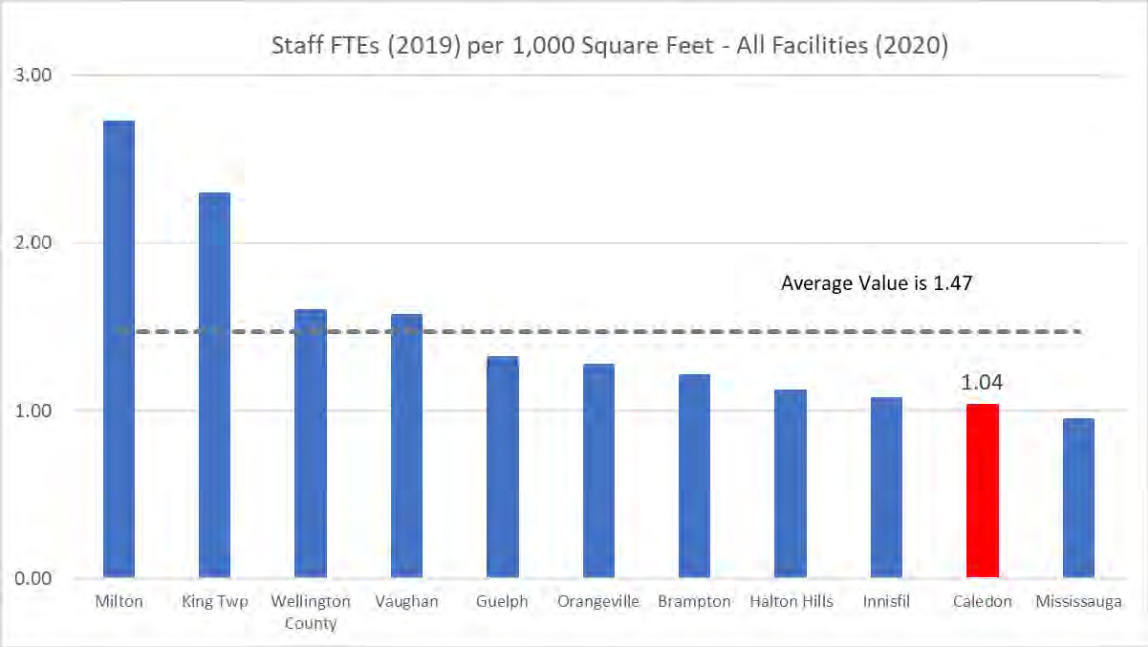


While the chart above shows an above average expenditure on library materials, when we take into account the number of branches in the chart below, Caledon falls slightly behind most of its peer libraries.

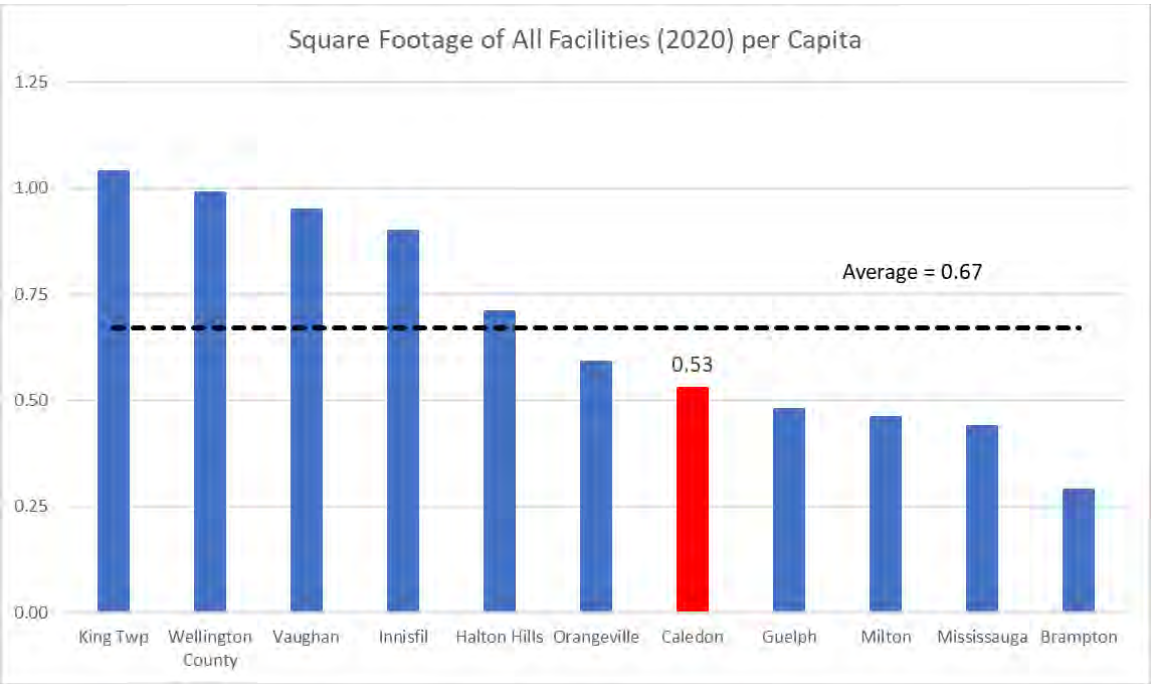


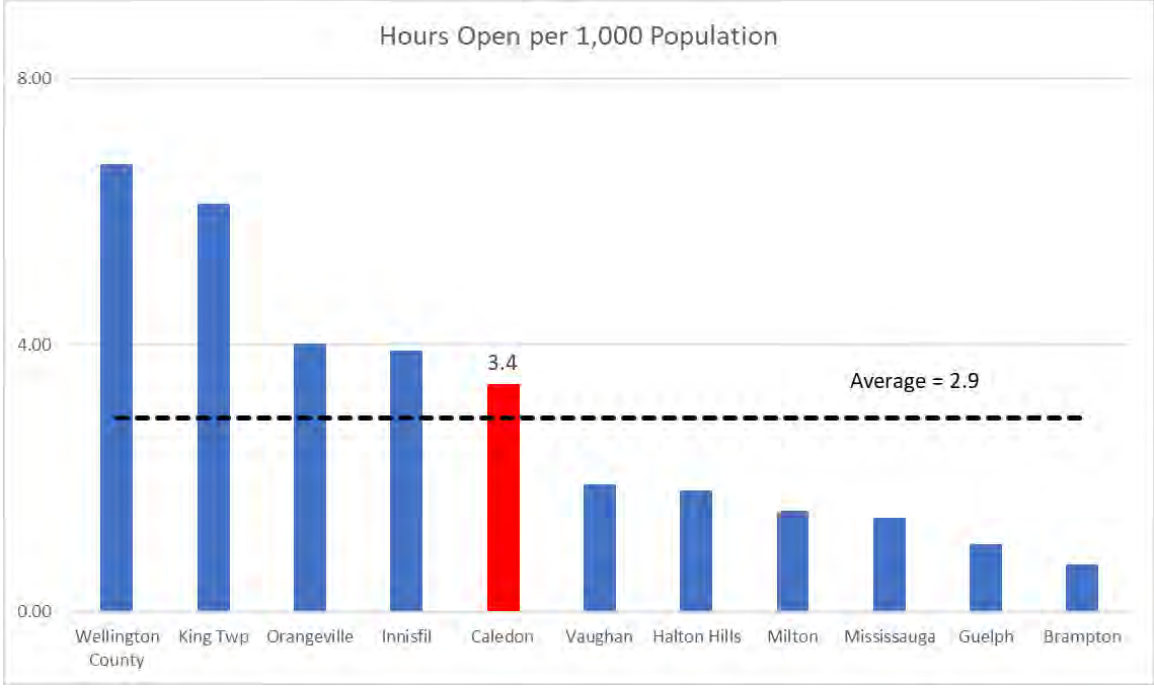


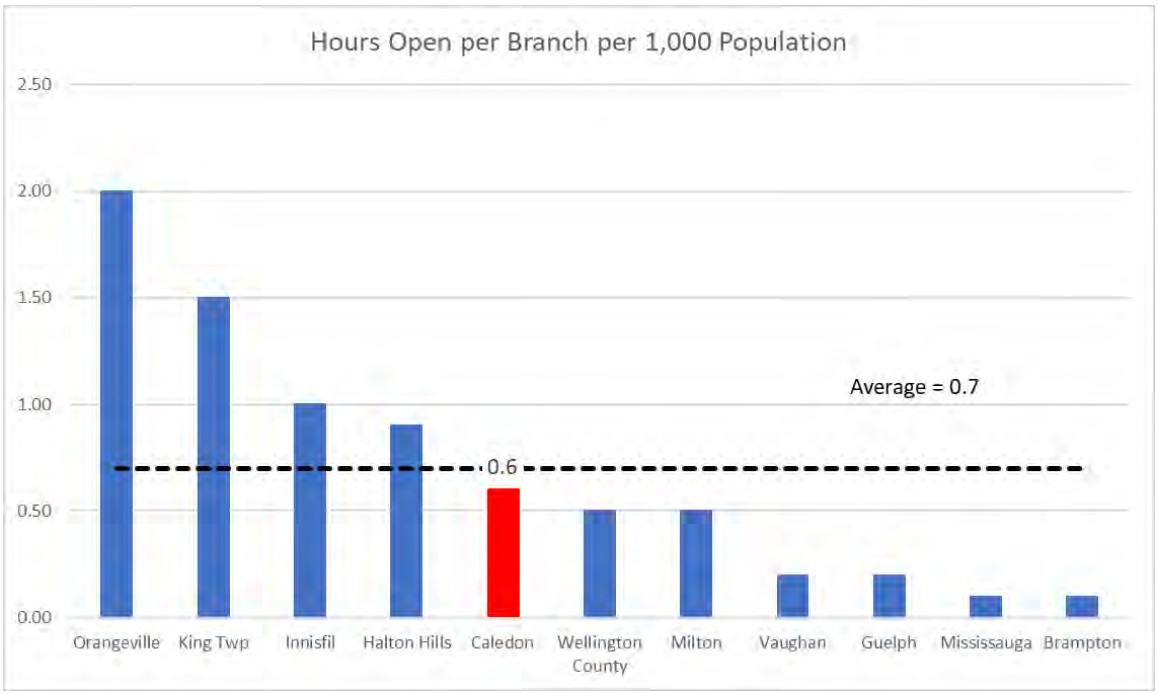
Likewise, the staffing available tells a different story based on whether the measure is population (above)or space or number of branches (below).

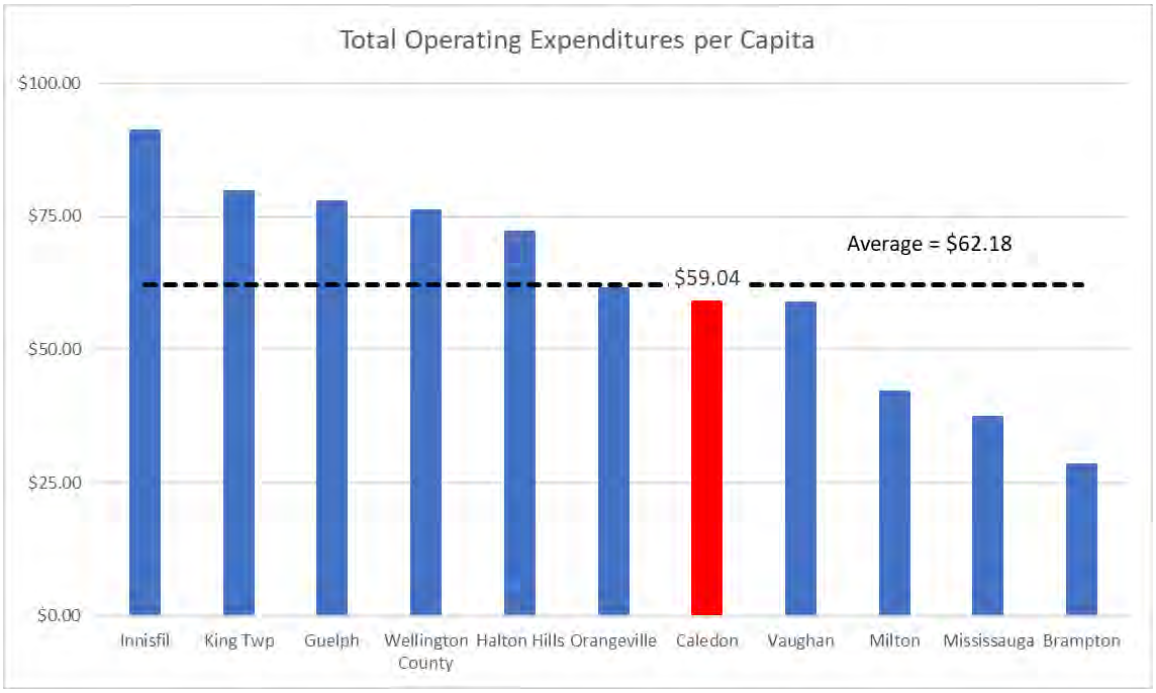


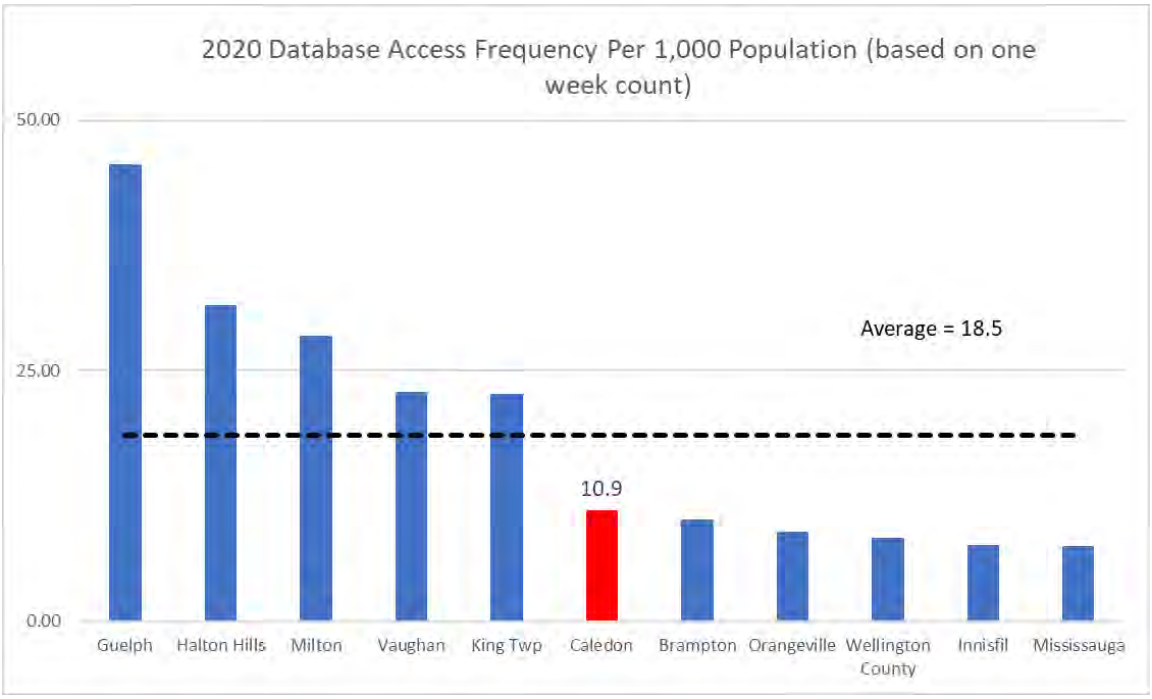
Even with the opening of the Southfields Branch in 2020, Caledon is still below most of the other libraries as indicated in the following charts.


Square Footage of All Facilities (2020) per Capita
1.25
1.00
0.75
0.50
0.25
0.00
Average = 0.67
0.53
King Twp
Wellington County
Vaughan
Innisfil
Halton Hills
Orangeville
Caledon
Guelph
Milton
Mississauga
Brampton


Hours Open per 1,000 Population
8.00
4.00
0.00
3.4
Average = 2.9
Wellington County
King Twp
Orangeville
Innisfil
Caledon
Vaughan
Halton Hills
Milton
Mississauga
Guelph
Brampton


Hours Open per Branch per 1,000 Population
2.50
2.00
1.50
1.00
0.50
0.00
Average = 0.7
0.6
Orangeville
King Twp
Innisfil
Halton Hills
Caledon
Wellington County
Milton
Vaughan
Guelph
Mississauga
Brampton


Total Operating Expenditures per Capita
$100.00
$75.00
$50.00
$25.00
$0.00
Average = $62.18
$59.04
Innisfil
King Twp
Guelph
Wellington County
Halton Hills
Orangeville
Caledon
Vaughan
Milton
Mississauga
Brampton



The above charts provide a visual display of how Caledon Public Library compares with similar and nearby library systems. The libraries were selected because they had at least two of the following attributes; they are nearby, multibranch, serve a municipality with a rural component, or are experiencing population growth similar to the Town of Caledon.

In summary, the results indicated that CPL has some challenges to reach even the average of the comparator libraries in most of the metrics, and even when Caledon's position is good (i.e., above average), when the number of branches is taken into effect, the position drops below average. The results of the benchmarking exercise also support other research and analysis in this report of the situation for Caledon.

Another benchmarking exercise is to compare the branches of the Caledon Public Library with the Administrators of Rural and Urban Public Libraries of Ontario (ARUPLO) Guidelines.

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 to 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.

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 enhanced roles, such as being

a resource library for a wider area, hosting a Makerspace, administrative functions, 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 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 and turnover rates will be low.

Because of the effect of the pandemic and the opening of the Southfields Branch in 2020, three years were considered; 2019 as a baseline, 2021 as branches started to reopen, and Q3 of 2022 (January 1 to September 30) as the most recent data available. We reported the physical circulation from the branches, not including interlibrary loans, online renewals, or circulation of electronic titles.

Branch	Size (sf)	Hours open per week	2019 Circulation	Percentage of Circulation	Estimated Population Served
Albion Bolton	15,132	60	132,929	54%	40,815
Alton	1,300	32.5	24,384	10%	7,487
Caledon East	8,000	53.5	32,924	13%	10,109
Caledon Village	2,400	39	19,555	8%	6,004
Inglewood	1,200	27	13,415	5%	4,119
Margaret Dunn	3,175	35	24,317	10%	7,466
Population	76,000		247,524		

Branch	Size (sf)	Hours open per week	2021 Circulation	Percentage of Circulation	Estimated Population Served
Albion Bolton	15,132	60	34,213	26%	19,745
Alton	1,300	32.5	15,670	12%	9,043
Caledon East	8,000	53.5	19,886	15%	11,476
Caledon Village	2,400	39	13,369	10%	7,715
Inglewood	1,200	27	6,982	5%	4,029
Margaret Dunn	3,175	35	8,967	7%	5,175
Southfields	7,768	60	32,603	25%	18,816
Population	76,000		131,690		

Branch	Size (sf)	Hours open per week	2022 Q3 Circulation	Percentage of Circulation	Estimated Population Served
Albion Bolton	15,552	60	38,641	26%	19,880
Alton	1,300	32.5	13,494	9%	6,942
Caledon East	8,000	53.5	21,303	14%	10,960
Caledon Village	2,400	39	11,637	8%	5,987
Inglewood	1,200	27	4,573	3%	2,353
Margaret Dunn	3,175	35	7,415	5%	3,815
Southfields	7,768	60	50,662	34%	26,064
Population	76,000		147,725		

It should be noted that there were several changes in branches during the time periods referenced in the charts above for example, in 2019, Southfields was not yet open, and in 2022 until June, the Albion Bolton Branch was closed and provided only holds pickup. This had a significant impact on the percentage calculated for all locations. Going forward, the new Caledon East branch will likely attract a higher percentage of the population, and all branches can be reassessed for their role in the library system.

Using the ARUPLO definition of branches above, the branches of the Caledon Public Library would be classified as follows based on population served according to the most recent (2022 Q3) relative circulation.

Small (up to 5,000 population)	Inglewood Margaret Dunn
Medium (5,000-10,000 population)	Alton Caledon Village
Large (10,000-35,000 population)	Albion Bolton Caledon East Southfields

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, Makerspace, or administrative services.

Small Branches compared with ARUPLO Guidelines

	Space 2,500 – 5,000 sq. ft.	**Hours of Operation 20-25 per week**
Inglewood	1,200	27
Margaret Dunn	3,175	35

Of Caledon's small branches, both meet the hours of operation guideline, and Margaret Dunn meets the space guideline. It is noted that Margaret Dunn is also in transition to a Collaboration Studio as mentioned elsewhere in this report.

Medium Branches compared with ARUPLO Guidelines

	Space 5,000 – 10,000 sq. ft.	**Hours of Operation 25-45 per week**
Alton	1,300	32.5
Caledon Village	2,400	39

Both of the medium branches meet the hours of operation guideline but not the space guideline. Note that at the time of this report (December 2022) Alton Branch hours were temporarily reduced to 28.5 hours per week and Caledon Village Branch hours were temporarily reduced to 35 hours per week due to staff shortages.

Large Branches compared with ARUPLO Guidelines

	Space 10,000 – 35,000 sq. ft.	**Hours of Operation 45-65 per week**
Albion Bolton	15,132	60
Caledon East	8,000	53.5
Southfields	7,768	60

The Caledon East branch will be relocated in 2023 which will provide a total 8,076 sq. ft. plus 1,493 Makerspace. Therefore, of the large branches, only Albion Bolton meets the space and hours guidelines, while Southfields and Caledon East branches meet the hours guidelines but not the space guidelines.

2.9. Summary Situation Analysis

This final part of the data analysis Section of the Report synthesizes the various perspectives raised during the consultation and research program. It identifies the major themes emerging that align with the recommendations subsequently developed.

The table below identifies the sources where these perspectives originate. In mapping the various themes to their sources, the following coding system is used:

SP – **S**trategic **P**lan
BM – Review of **B**ackground Data and **M**aterials
KSI – **K**ey **S**takeholder **I**nterviews
CS – **C**ommunity **S**urvey
SS – **S**taff **S**urvey
B – **B**enchmarking Assessment
CJ – **C**onsultants' **J**udgment

Themes Identified Through the Research and Community Engagement Process	Source of Information						
	SP	BM	KSI	CS	SS	B	CJ
a) Not enough space to serve the community properly	✓	✓	✓	✓	✓	✓	✓
b) Need for additional branches	✓	✓	✓	✓	✓	✓	✓
c) Rural branches need to be kept to serve rural communities	✓	✓	✓	✓	✓		✓
d) Methods of alternative service delivery to underserved areas could be explored	✓	✓	✓		✓	✓	✓
e) Programs are very well regarded and need to be continuously developed to meet community need			✓	✓	✓		✓
f) Online and virtual programs will continue to be important and likely increasingly so in future	✓		✓	✓	✓		✓
g) Opportunity for more streamlined model of customer service					✓		✓
h) Need for continued growth of and investment in the collections				✓	✓		✓
i) Organization structure could be more effectively aligned with strategic objectives			✓		✓		✓
j) Community diversity needs to be better reflected in Board and staff	✓		✓		✓		✓
k) Lack of awareness of library offerings in the community is an issue hampering use			✓	✓	✓		✓
l) Need to keep pace with technological opportunities			✓		✓		✓

Elaboration on the main themes heard were:

a) **There is a current deficit of space:** The analysis of library space provision relative to the size of the population according to new library standards is deficient; more space is needed.

b) **There is a need for more space and opportunity to develop additional branches:** The tremendous population growth experienced by Caledon in the past, and the continuing growth and diversification of the population in the future, will require an ambitious program of growth and development for more space and new branches.

c) **A strong desire to retain the rural branches:** In the rural areas of the municipality (primarily Ward 1) there is fierce attachment to the existing small branches of Inglewood, Caledon Village and Alton. Closure or consolidation of any or all of these branches would cause significant concern. A related theme mentioned was an opportunity to 'pair' rural branches with larger and better-resourced counterparts, so that: (a) larger branches could act as 'marketing springboards' to nearby rural branches for certain specialized types of offerings perhaps not available in the larger branches, and (b) rural branches might offer a deliver a fuller range of services to their local communities by hosting programs developed at the larger branches. The additional staffing implications of this 'pairing approach' would need to be carefully considered.

d) **Opportunity to explore and invest in alternative service delivery:** The municipality is very large and extensive, and it will take some time to build out a program of new branches. In the interim, alternative service delivery options should be explored and implemented, such as open access at the rural branches, a bookmobile, holds lockers, book kiosks, temporary branches in rural locations, etc.

e) **Programs and services greatly appreciated:** There is a very high degree of satisfaction with programs and services provided in the various library branches. They are well regarded for being innovative and responding to local demand. This has created an expectation for continuing delivery of high-quality services to respond to increasing growth in the community. As well, there is a perceived need to ensure that programs and services in other languages to respond to the increasing diversity of the community will be in place. This is true both of in-library programs and services (which are expected to return to some level of normalcy over the period of this plan) as well as online ones. As well, there is a recognition that additional staffing, to provide these new programs and services, will be required.

f) **Recognition of the importance of virtual and online services:** The pandemic has shown the incredible importance of online programs and services as a risk-free and cost-effective means of providing engagement with the library. (Some library systems have even gone to the extent of positioning their services as including an 'online branch' such as CPL's Digital Library). It is expected that the demand for online services will continue to grow, even with some return to normalcy in terms of greater in-library

usage. And, as with 'in-library' programs and services, it is understood that this will require additional staff.

g) **Possibly some opportunities for more responsive model of customer service:** An emerging model of improved customer service in libraries is one where all front-line staff are seen to be 'generalists', able help any user with any reasonable request, rather than staff having narrow specialties, and needing to refer routine requests to other departments. There appear to be varied opinions on this issue, with some staff feeling it is already in place, while others feel there is an ongoing need to reinforce this approach. The very fact that there is disagreement may indicate a need to ensure a more consistent and assured approach.

h) **Recognition of need for continuing growth of and investment in the collections:** As the community grows and diversifies, it will continue to be important that the collections of the library (both print and digital materials) will need to grow. Ongoing collection investment and allocation will also need to reflect the continuing increase in diversity of the population.

i) **Opportunity for streamlined organization structure:** As the overall system grows in complexity, there is an opportunity (if not need) to simplify the organization structure to ensure that it is manageable within the context of a much larger system (i.e., with more staff and financial resources). Opportunities for streamlining the system and reducing redundancy and complexity should be assessed (e.g., through streamlined processes, simplifying departments, etc. (Section 4 of the Report provides more details of these possibilities).

j) **Opportunity to reflect community diversity:** With the growth of Caledon as well as the increasing ethnocultural makeup of the community, there is an opportunity (if not an obligation) to try to achieve more of a balance in terms of the extent to which the staff structure mirrors the community. Eventually, this logic could / should apply to the Board level as well.

k) **Lack of awareness of Library offering:** As is the case with libraries everywhere 'lack of awareness' of programs and services available is seen to be a huge barrier to use. More targeted and effective marketing methods, including increased use of social media, were advocated.

l) **Continue to keep pace with technological opportunities:** The rapid pace of technological change presents ongoing opportunities for improved services both externally for users of the library, as well as internally for management and staff. CPL has done a good job historically of keeping up with technological opportunities; this is acknowledged and expected to continue into the future. Key opportunities mentioned in this regard include: open access in rural branches; self-service and mobile options;

and continuing use of the OLC consortium – at least in the short term; among others. It is understood that training in the use of these tools will also clearly be required.

3. Comprehensive Growth Plan Components

This section of the Report contains the essence of the Comprehensive Growth Plan itself. First a proposed **growth trajectory for the addition of library space and branches** in the community is discussed. This outlines the overall philosophy and approach to meeting the needs of Caledon's growing population over the next twenty years or so (i.e., to 2041). A four-stage process is proposed, and the next part of this section outlines the proposed **facility implications** at each stage in some detail. Finally various **other implications** of the growth trajectory proposed are discussed (program and service development, technology, and organization and staffing).

3.1. A Proposed Trajectory for Growth of Library Space and Branches

3.1.1. Recommended Space Standard

A decade ago, the Ontario Library Service (OLS) had recommended a general standard of 0.7 square feet of library space per person in the planning of new library spaces to meet the needs of new populations. However, in our view that standard is now too low.

There are several factors that explain a revised square-foot-per-person standard of library space provision (resulting in a higher figure than the 0.7 per sq. ft. standard previously recommended by the OLS and used previously in many library studies). These factors are:

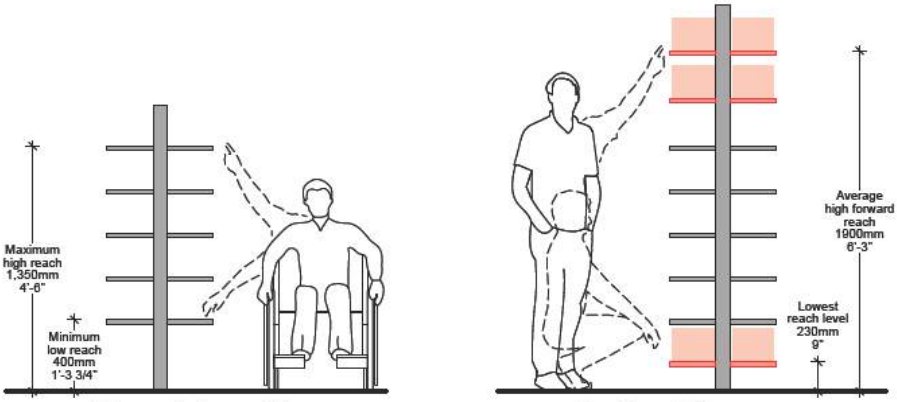
1. Additional space to accommodate new accessibility standards;
2. Additional public space required for meeting rooms, study spaces, etc.;
3. Additional space required for administrative purposes; and
4. Additional space required by the impact of COVID.

The rationale for additional space in each of these areas is outlined below.

1. **Additional space to accommodate new accessibility standards**
   Facility Accessibility Design Standards (FADS)[7] which many municipalities have adopted or aspire to require that books and other materials on shelves be accessible by a person in a wheelchair. This means that, for a library with five shelves from top to bottom (a very common configuration in modern libraries), the top shelf and the bottom shelf are not accessible. Accordingly, an accessible library might only have three shelves, all reachable by a person in a wheelchair (see diagram following). Library aisles also have to

[7] *https://pub-london.escribemeetings.com/filestream.ashx?DocumentId=86723*

allow for wheelchair travel and turning room. Note that the FADS standards, would require 43% more space, to house the same number of items.



Offsetting this to some extent, is a countervailing trend seen in many libraries to reduce the amount of material on the shelves. Many libraries are downsizing their reference collections, no longer keeping hard copies of magazines, eliminating their CD and DVD collections (in favour of making streaming services available to patrons), and generally taking a more rigorous weeding approach to the materials they keep in the stacks). As a very general rule of thumb, a more proactive approach to weeding may result in a 10% downsizing of the space requirements of the library.

So, putting this all together, the amount of additional space required in a modern accessible library compared to what it might have been 10 to 15 years ago could be calculated as follows (this example is based upon a hypothetical example of a library with 10,000 sq. ft. of space at present devoted to collections):

Space currently devoted to collections under the 0.7 sq. ft. per capita standard	10,000 sq. ft.
Space required to meet current accessibility standards (40% more)	14,000 sq. ft.
Space saved as result of more intensive weeding approach (10% of 'new' total of 14,000 sq. ft.)	1,400 sq. ft.
Net total space required	12,600 sq. ft.
Percentage increase over space required under 'previous standard'	26% more

2. **Additional public space required for meeting rooms, study spaces, etc.**
A second factor contributing to an increase in the per-square-foot standard stems from the changing role of libraries as being not just places to store information and books, but places to encourage social interaction, creative activities, workshops, learning experiences, community gathering places, and (possibly) remote and co-working locations for residents. This results in an increase in demand for meeting rooms, study spaces, creative spaces (e.g., Makerspaces, etc.) as libraries have increasingly come to

play the role of community hubs and gathering spaces. This is more difficult to quantify empirically, but a 25% increase in the amount of space allowed for this critical function of libraries, over what it was a decade ago, is in our view reasonable.

3. **Additional space required for administrative purposes**
   Nearly every library system with which we have worked is under-resourced when it comes to space for essential administrative and 'behind the scenes' functions – including storage. Again, while strong empirical evidence is lacking, in our experience a 25% increase in the amount of space historically allocated to this function is warranted (and perhaps, if anything, conservative).

4. **Impact of COVID**
   While the impact of COVID has yet to be fully determined; it is reasonable to assume that it will not dissipate quickly. Assuming there are long term impacts, then additional space will be required for study rooms, programming areas and meeting spaces.

5. **Revised Standard**
   As mentioned, a commonly used standard a decade ago was 0.7 square feet per capita[8]. There are also several standards (e.g., ARUPLO, SOLS, etc.) that are much higher than this level which are discussed in the previous section. Increasing the 0.7 square feet per capita standard used a decade ago by 26% yields approximately 0.87 square feet per capita. Rounding down to 0.85 square feet per capita is in our view a reasonable approach, and also takes into account some economies of scale with shared spaces (washrooms, stairwells, entry spaces, etc.). Accordingly, this is the standard that is used in this assessment.

3.1.2. Space Deficit Analysis

There are two key aspects to determining the amount of library space required to adequately serve the population of Caledon: first is to determine the amount of space *currently* required in order to meet the recommended space standard; and the second is to anticipate future population growth and determine the amount of space that will be required in future. And, this analysis not only needs to determine the amount of space required overall, but also its location in the municipality.

Current Space Deficit

This is relatively straightforward to calculate. The current population of the municipality (as of the recent Census) is just under 77,000. Given the recommended space standard described above, this implies on the order of 65,000 square feet (sq. ft.) of library space. The current

[8] *Note from the benchmarking assessment, that Caledon's current provision is 0.57 square feet per capita.*

provision of space is only 39,000 sq. ft., implying a current deficit of 26,000 sq. ft. (and a current level of space provision of only 0.5 sq. ft. per capita – about 60% of the recommended amount):

(A) *Current Population (as of 2021 Census)*	*76,580*
(B) *Amount of Library Space that should be provided as per Recommended Space Standard (.85 per capita)*	*65,000 sq. ft. (rounded)*
(C) *Actual Amount of Library Space Provided in Caledon*	*39,000 sq. ft.*
(D) *Deficit (i.e., B minus C)*	*26,000 sq. ft.*

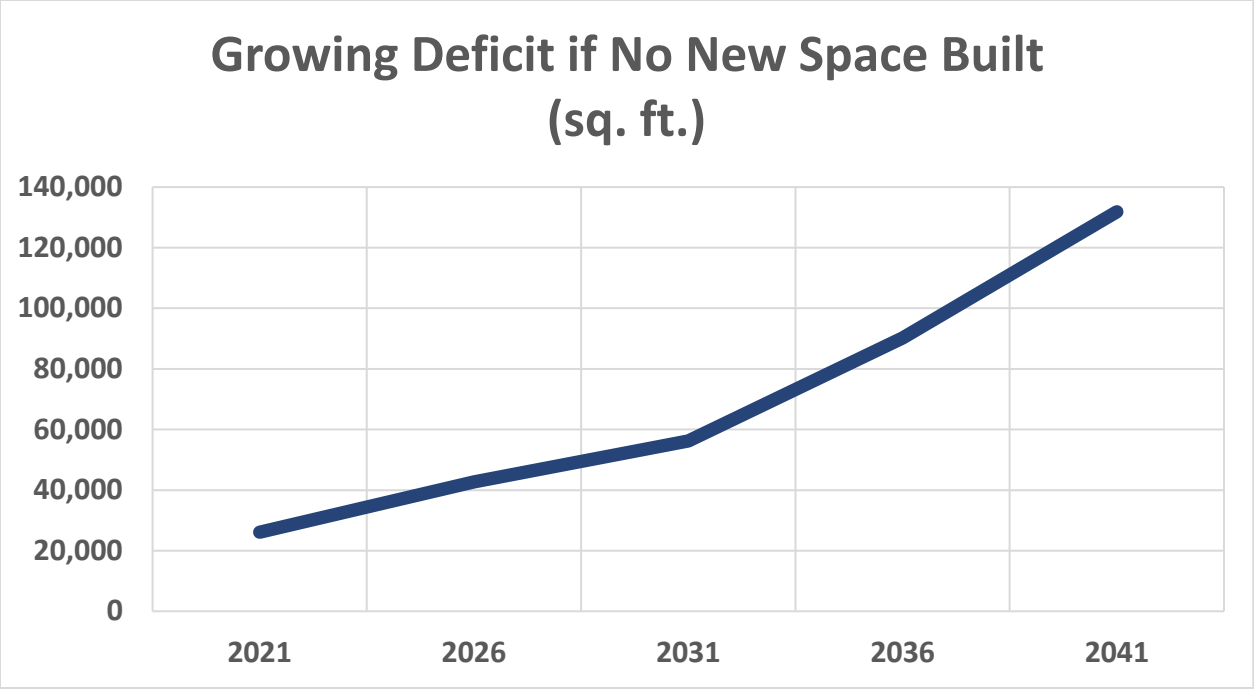
Future Space Deficit

On the outskirts of the Greater Toronto Area, Caledon is experiencing very rapid growth. Over the 2016 -2021 Census period, Caledon recorded a 15.5% increase in population, nearly three times that of the province overall (5.8%). This high pace of growth is expected to continue into the future.

TCI met with the officials from the Planning Department to obtain the anticipated population projections for the Town overall. These are shown in the table below as well as the implied total amount of library space required in the community in that year (at the recommended space standard).

Year:	Current (2021)	2026	2031	2036	2041
Anticipated population in that year	76,580	96,067	111,992	151,964	200,996
Total space requirements (sq. ft.) in that year (at the recommended space Standard)	65,093	81,657	95,193	129,169	170,847
Space deficit if no new space built (sq. ft.)	26,093	42,657	56,193	90,169	131,847

If no new space were to be built, this would clearly imply a hugely growing space deficit for the Town as shown in the table above and the chart below:



Future Space Deficit by Ward

The team developed a model to estimate the space deficit by ward if no additional library space was added. The model roughly assigns the existing and currently planned space (including the move to the Caledon East Community Centre and the planned Mayfield West branch) to the ward system based on existing usage patterns and reasonable estimates of future branch usage patterns by ward. The expected surplus and deficit by ward are shown in the table below.

Projected Space Surplus or Deficit (shown in brackets) by Ward Assuming Completion of Move to Caledon East Community Centre and Construction of Planned 20,000 Square Foot Mayfield West Branch (sq. ft.)

	2021	2026	2031	2036	2041
Ward 1	(6,051)	(5,792)	(5,581)	(5,802)	(6,182)
Ward 2	(5,209)	4,746	(2,606)	(19,875)	(33,827)
Ward 3	(1,678)	(1,853)	(2,529)	(5,143)	(19,436)
Ward 4	(3,946)	(3,967)	(4,018)	(4,586)	(5,312)
Ward 5	(8,752)	(9,997)	(12,856)	(24,570)	(31,491)
Ward 6	(3,387)	(4,878)	(7,688)	(9,276)	(14,682)
Total	**(29,023)**	**(21,741)**	**(35,277)**	**(69,253)**	**(110,930)**

Note: The above table assumes the addition of a 20,000 square foot branch at Mayfield West as is planned for completion prior to 2026.

3.1.3. Proposed Growth Trajectory

A 'growth trajectory' in four five-year stages was developed to address this growing space deficit over the next twenty years. This 'growth trajectory' takes into account the expected space deficit by ward and was discussed extensively with the CEO and senior library staff, as well as internally within the study team. This trajectory is one way to ensure that sufficient space is made available to meet the needs of the community when and where growth is expected. It represents one path forward to address the needs of the community in a responsible and managed way – but there are others, and it is quite conceivable that some of the stages may be switched around depending on how the parameters of growth of the municipality towards the end of the next decade and beyond become better known.

The four stages of proposed development are:

Stage in the Growth Trajectory	Key Developments	Proposed Amount of Space Added to Inventory
Stage 1: 20–1 - 2026	• refurbishment of Ward 1 branches (anticipated to add about 1,000 sf at Alton branch) • development of new 30,000 sf facility at Mayfield West (an increase of 10,000 sf over the previous plan) • relocation of Caledon East Branch to 9,569 sf at Caledon East Community Centre (CECC) resulting in a net addition of about 2,000 sf • Implement self-service and open access to deliver to branches after open hours	33,000 sf
Stage 2: 20–7 - 2031	• 35,000 sf at Macville/Caledon Station	35,000 sf
Stage 3: 20–2 - 2036	• 20,000 sf expansion in Mayfield West	20,000 sf
Stage 4: 20–7 - 2041	• 40,000 sf expansion of Albion Bolton branch or construction of secondary facility	40,000 sf

The following charts explain the logic of this growth trajectory in greater detail:

Column A) outlines the stage and main development activities occurring

Column B) identifies the specific time period under consideration

Column C) is the population growth projects at the **end** of that time period

Column D) is the total amount of library space that will be required at the end of the period, given the anticipated population *(at the standard of 0.85 sq. ft. per capita)*

Column E) is the amount of library space anticipated at the beginning of the period, assuming that the new space proposed in the previous stage is actually developed

Column F) is the deficit remaining at the beginning of the period (i.e., Column D minus Column E)

Column G) is the new space proposed to be added to the overall library system over that time period (and that will be in place by the end of the time period)

Column H) is simply any comment on the development activities that will have occurred over that time period

Column I) is the deficit that remains after the development activity has occurred over the period and new library space has been added to the inventory

Caledon Library Comprehensive Growth Plan – Proposed Growth Trajectory

Notes:

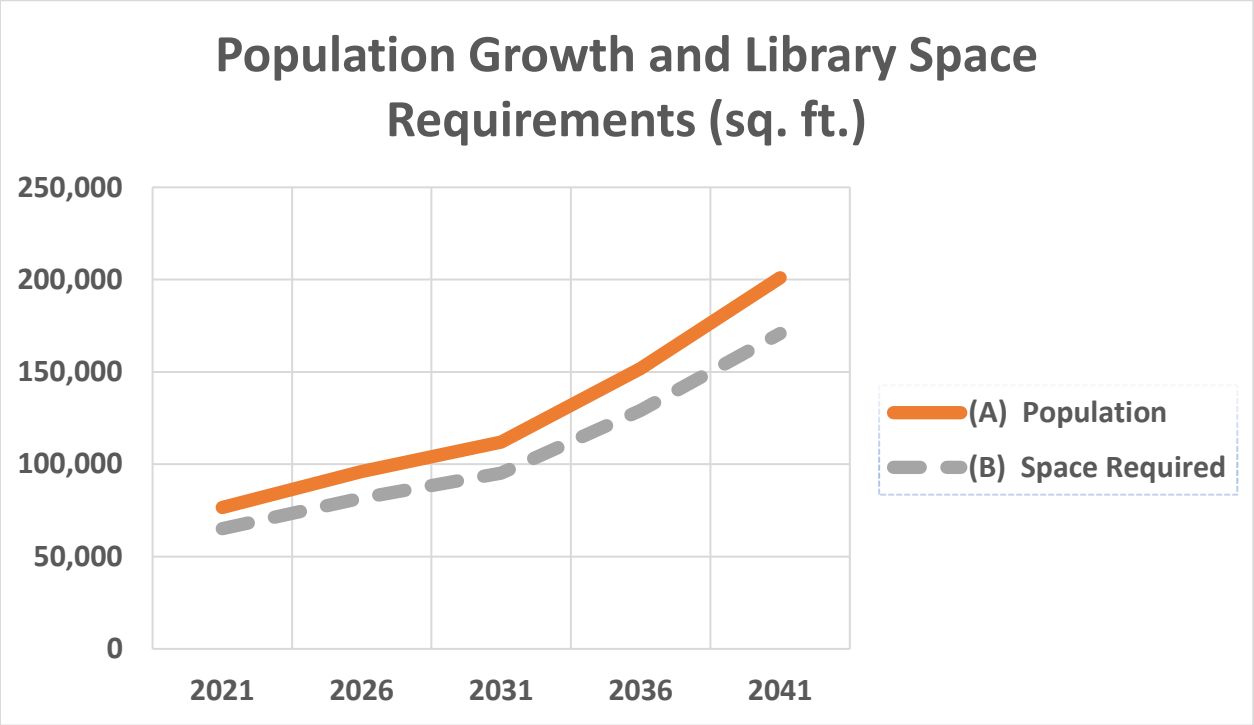
- *assumes standard of 0.85 sq. ft. per capita*
- *population growth projections supplied by Town*
- *plan below aimed at meeting Town's implied library space needs by 2041 (+/- 10%)*
- *opportunities for co-location with recreation facilities (to be presented to the community through the Parks and Recreation Strategic Plan) not considered*
- *Stages 3 and 4 below could be switched*

(A) **Stage and Activity**		**(B)** **Time Period (C)** **Population at End of Period**	**(D)** **Total Space Required at end of time period** ***(at 0.85 sq. ft. per I)***	**(E)** **Space Expected at Beginning of Period**	**(F)** **Anticipated Deficit by End of Period (D – E)**	**(G)** **Net New Space Proposed Added to System During Period**	**(H)** **Comment on New Space Added and Existing Space**	**(I)** **Remaining Deficit or Surplus After Proposed New Space Added (F – G)**	
Stage 1. New 30,000 sq. ft. branch at Mayfield West and refresh Rural Branches		2021-2026	96,067	82,000 sq. ft.	- **39,000 sq. ft.** (Current Base)	43,000 sq. ft.	- 30,000 sq. ft. at Mayfield West - 1,000 sq. ft. (from slight expansion at Alton - 2,000 sq. ft. (net new space) at Caledon East = **33,000 sq. ft.**	- Mayfield West expected to come on-stream 2025 - Will preserve existing branches in Ward 1 while providing some additional space (note: population decrease	10,000 sq. ft. (deficit)

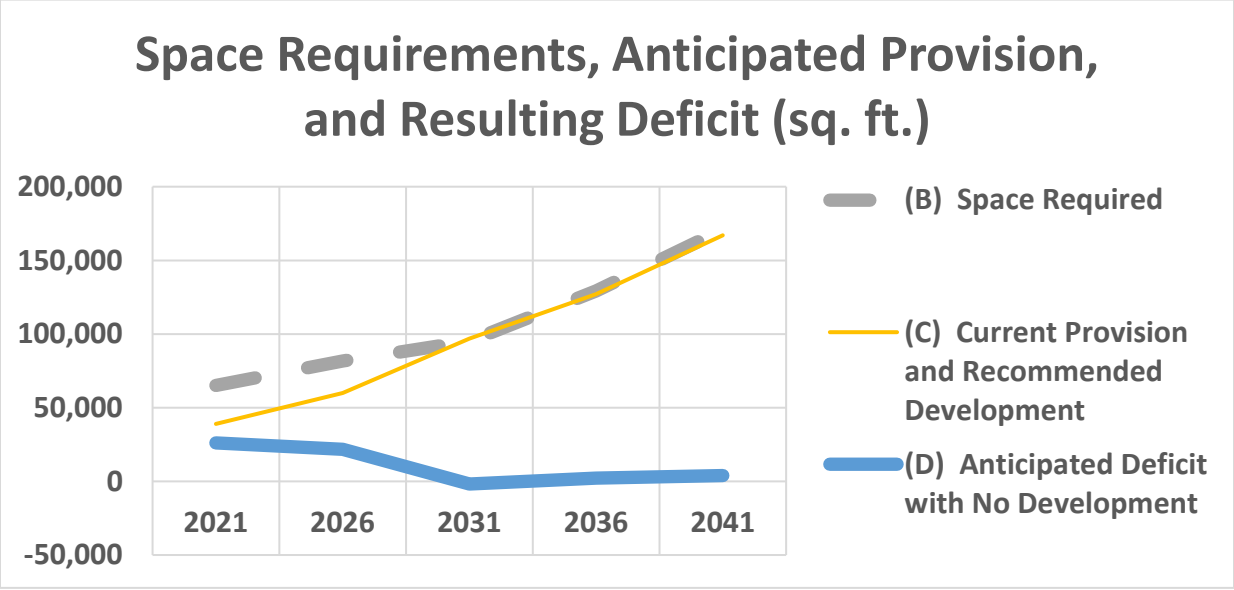
							expected in Ward 1) - Provide Open Access and self check at rural branches beginning at Inglewood - Reconfigure space at Caledon Village	

(A) Stage and Activity	(B) Time Period	(C) Population at End of Period	(D) Total Space Required at end of time period *(at 0.85 sq. ft per cap)*	(E) Space Expected at Beginning of Period	(F) Anticipated Deficit by End of Period (D – E)	(G) Net New Space Proposed Added to System During Period	(H) Comment on New Space Added and Existing Space	(I) Remaining Deficit or Surplus After Proposed New Space Added (F – G)
Stage 2. Build new 35,000 sq. ft. branch at Macville *(proximate to new GO –station)*	2027 - 2031	111,992	95,000 sq. ft.	- **72,000 sq. ft.** Base from previous stage (assumes Mayfield West, 2,000 net new space at Caledon East and small expansion at Alton takes place in Stage 1)	23,000 sq. ft.	- 35,000 sq. ft. at Macville = **35,000 sq. ft.**	Macville is central location for Wards 3, 5 and 6, and will serve the growing community there around the proposed GO station	12,000 sq. ft. (surplus)
Stage 3. Expand in Mayfield West by another 20,00– sq. ft.	2032 - 2036	151,964	129,000 sq. ft.	**107,000 sq. ft.** Base from previous stage (assumes Macville is built)	22,000 sq. ft.	- **20,000 sq. ft.** in Mayfield West	Add on to existing 30,000 sq. ft. facility expected in 2031 – or just build new 50,000 sq. ft. main library from the outset	2,000 sq. ft. (deficit)
Stage 4. Expand in Bolton area by another 40,00– sq. ft.	2037 - 2041	200,996	171,000 sq. ft.	- **127,000 sq. ft.** Base from previous stage	44,000 sq. ft.	- **40,000 sq. ft.** expansion in Albion Bolton	Could be development of entire new branch in Bolton area, or addition to existing Albion Bolton branch Total sq. ft. in Albion Bolton area would be 55,132 sq. ft.	4,000 sq. ft. (deficit)

The following charts outline the key parameters of each of these four stages in graphic form. The chart below simply shows the growth in total library space following the trend in population growth:



The next chart shows the deficit in space shrinking as the proposed new facilities come on-stream. As the chart shows, by 2031 the space deficit will largely be eliminated. The balance between supply and demand achieved by this growth plan will essentially continue over the following decade, i.e., from 2031 to 2041.



3.2. Facility Implications

3.2.1. Stage 1 (to 2026): Build New 30,000 sq. ft. Branch at Mayfield West and Refurbish Rural Branches

3.2.1.1. Rationale for this Element of the Comprehensive Growth Plan

Mayfield West New Building

As noted in the growth trajectory table in section 3.1.3, there is a need for additional space at Mayfield West. Currently, the Town is planning an expansion of 20,000 sq. ft. in Mayfield West. While this will meet the needs of the community in the short term, the community's expected continued growth will cause it to have a considerable library space deficit for the years 2036 and onwards. Further, the recent passage of Bill 23, *More Homes Built Faster Act*, may result in development occurring more quickly than originally anticipated. This legislation may also affect the Town's ability to collect development charges in support of new infrastructure and services – including public libraries.

A total of 50,000 square feet of library space at Mayfield will be required to meet the standard prior to 2041. Accordingly, we are recommending that Mayfield West should begin with a 30,000 square feet expansion prior to 2026, rather than a 20,000 square foot expansion as currently planned. Alternatively, Caledon could also build a 50,000 square foot branch in the short term in order to meet its needs for the next two decades at this location.

The addition of 30,000 square feet at Mayfield West together with the refurbishment of Alton and the move to the Caledon East Community Centre will help reduce the current library space deficit in Caledon which is projected to be 10,000 square feet at the end of Stage 1 assuming all recommended projects are undertaken.

Refurbishment of Rural Branches

The 2016 Master Plan noted a number of deficiencies with the rural branches including Alton, Inglewood and Caledon Village. They included that the branches were small and in need of refurbishment. As noted, Alton (1300 sq. ft.), Caledon Village (2400 sq. ft) and Inglewood (1200 sq. ft) branches are located within Caledon's rural villages, often serving as the only municipal or community resource within each of these areas. Additionally, the site of the Caledon Village branch near the intersection of Highway 10 and Charleston Side Road makes access to and from the branch onto Highway 10 at times challenging and potentially dangerous. In the longer term, the 2016 Master Plan recommended creation of a Village Hub somewhere in the northwest rural area which would include a larger library combined with recreation facilities and community organizations. The three rural branches would then be relocated into the Village Hub.

If, as a result of the upcoming Caledon Community Services Comprehensive Plan, there is a recommendation to provide a recreation complex in the northwest, the creation of a Village Hub with a library as part of the complex should be revisited. If this recommendation is not part of the Parks and Recreation Strategic Plan, then our recommendation is to refurbish the branches in the northwest.

As noted in the demographic projections, the northwest rural area in Ward 1 is not expected to experience much growth in the next 20 years and would not likely attract significant development charge (DC) funding. The ability to create a Village Hub in the longer term should not be ruled out, but would require a strong recommendation from the upcoming Parks and Recreation Strategic Plan to support the construction of such a facility. Accordingly, in the discussion which follows, we have examined possible approaches to refurbishing the three rural branches as well as the possibility of modest additions to these facilities, rather than decommissioning these existing branches and building a new facility. (Note that there was also concern expressed in the community survey about losing the rural branches.)

In the following sections, we first discuss some site design and building strategy implications of building new branches in Caledon, and secondly some proposed refurbishments to Alton and Caledon Village branches.

3.2.1.2. Specific Site and Location Considerations for Building New Branches

Based on the projected population growth in the Town of Caledon, as presented in earlier sections of this report, a number of new facilities or additions to existing facilities will be required to provide high quality library services to the residents of Caledon. Specific sites owned by the Town of Caledon have not been examined in detail to analyze their suitability for future new library branches. To help in the site selection process and subsequent design work for planned library facilities, the following key aspects should be considered:

A. Zoning by-law Requirements
B. Key Site Design Strategies
C. Key Building Strategies

The following sections discuss each of these aspects.

In the example which follows, a 30,000 square foot building is used as is recommended for the Mayfield West stage 1 expansion.

A) Zoning by-law Requirements

Per the Town of Caledon's zoning by-laws, library buildings fall under the Institutional (I) uses category. Below are some of the key requirements for such building types from the zoning by-laws that are important to keep in mind for site selection of new library branches:

1. Maximum area of site that could be used by a building's footprint: 25% of site area
2. Minimum amount of landscaped areas: 20% of site area
3. Maximum building height: 10.5m (This allows for a 3-storey building)
4. Parking Requirements: The Town's by-laws note that the minimum number of parking spaces required is 1 parking spot per 30m2 of net building floor area. As an example, for a building that is 2,790m2 (30,000 sq. ft.) in gross floor area, and based on the bylaws' definition of what is included in net floor area, approximately 66 parking spots would be required
5. Truck Delivery Space: 1 space is required per building

The following diagrams illustrate the above requirements and others for a theoretical site to suit a proposed new branch that is 30,000 square feet in gross floor area. Two scenarios are shown; the first a single storey 30,000 square foot footprint, and the second a two-storey building, with 20,000 square feet on the first floor, and 10,000 square feet on the second storey.

This can provide guidance for site selection for stand-alone new library branches or ones that are co-located with other public facilities on the same site. The preference of the Board and the Town is for co-location with other community services as the preferred option as opposed to a stand-alone facility.

The same considerations can also be scaled for library buildings of different sizes.

Figure 1: Site Zoning Parameters illustrated on a Hypothetical Site for a 1-storey 30,000 square foot branch. 2.75 acres site required

Figure 2: Site Zoning Parameters illustrated on a Hypothetical Site for a 2-storey 30,000 square foot branch. 1.84 acres site required

B) Key Site Design Strategies:

The following are some strategies to consider for during site selection process for the site of a potential library project:

1. In library buildings, there is a natural preference for single storey buildings specially if site choices allow that in a suburban context. However, multi-storey libraries can be built and are an option if available site(s) are small. The Town's Bolton branch is an example of that;
2. If the site is shared with other functions (e.g., community centre), there may be benefits and efficiencies gained by sharing certain functions with other users, e.g., washrooms, reception, meeting rooms, etc. In a shared facility, the Library's preference would be to retain operational control over its own premises with the shared facility.
3. Balance of modal transportation choices. Added transportation options could offset parking requirements (quantity) and site size;
4. Emphasis upon street engagement and pedestrian access. Avoid a conventional site organization that requires pedestrians to walk through large areas of parking to access the door;
5. Planning for future growth through site selection that allows for that, and placement of building on site to account for future additions and construction activities; and

6. Arrange the interface of building and site to offer quality landscaped areas that are accessible from the building interior and support functional programming.

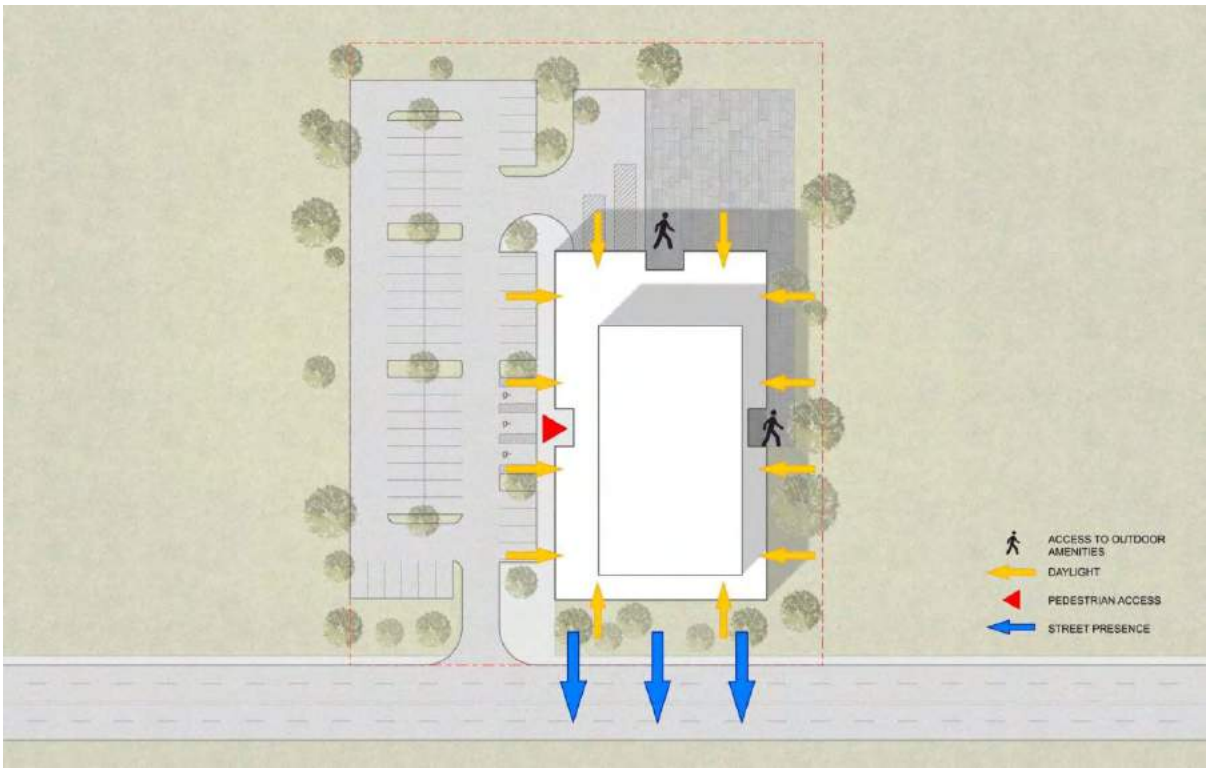


Figure 3: Site Design strategies illustrated on a theoretical site with a 2-storey library branch

The following examples show these design strategies applied elsewhere:

Figure 4: Hutong Children's Library in Beijing, ZAO Architects

Figure 5: Boise Library, Montreal. By Lemay Architects

C) Building Design Considerations:

The following are some strategies to guide the building design for new branches or additions to existing branches:

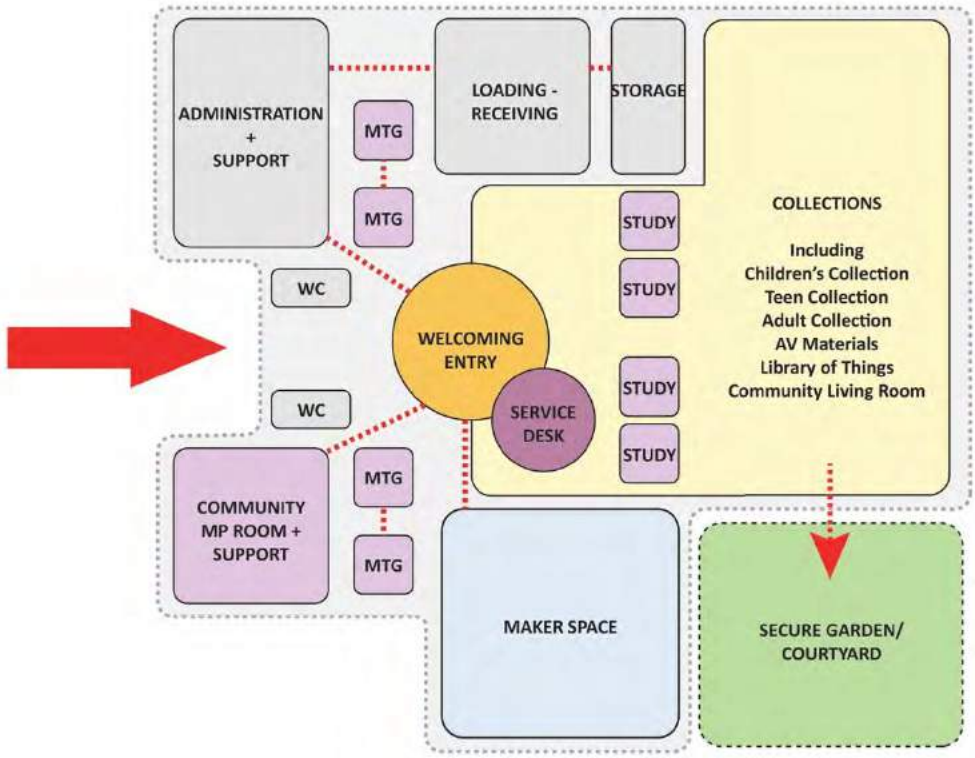
1. Single-storey library is more desirable if the site is large enough;
2. Develop a modular structure that can adapt to new unpredicted uses while contributing to the overall character of the space and not be similar to commercial type structures;
3. Encourage open and flexible adjacencies between functional areas (see Adjacency Relationships diagrams and discussion below);
4. Articulate building design and layout to maximize access to daylight to all spaces;
5. Develop an infrastructure network for power, cabling, and internet provisions that is robust and adaptable for changing space layouts that generously serves the entire floor area and building perimeter;
6. Include a community meeting space that could operate independently with exterior access, if needed;
7. Consider broad user needs, by quality of space, rather than prescriptive programme (i.e., quiet and intimate, wet and messy, flexible gatherings, adaptable to social distancing, etc.); and
8. Carefully review types and extents of spaces that are required to maintain and serve same level of occupants in a pandemic scenario such as the COVID-19 pandemic that has been ongoing since February 2020. Designing any of the spaces in the library, such as an open area for computer desks for example, to accommodate same number of occupants during regular times and in times where physical distancing requirements are more stringent has implications on the required space program areas which affects capital budget requirements.
9. Ensure sufficient storage space to accommodate above needs.

Adjacency Relationships

The two figures below present possible adjacency relationships for each of the proposed 1-storey and 2-storey 30,000 square foot buildings discussed in this section. These diagrams are intended to indicate primary elements and preferred adjacencies. They are not intended as floor plans or to show the spaces in scale. The first diagram shows possible spatial relationships between several key functions for the 1 storey option.

With regard to each option presented below, the adjacencies should be re-examined if the library is collocated within a complex that includes other community facilities such as a recreation complex or other community services. For example, there may be some spatial efficiencies gained in a mixed use or collocated facility by sharing some of the functions in a common space such as washrooms, meeting spaces, entrance area, parking, loading etc.

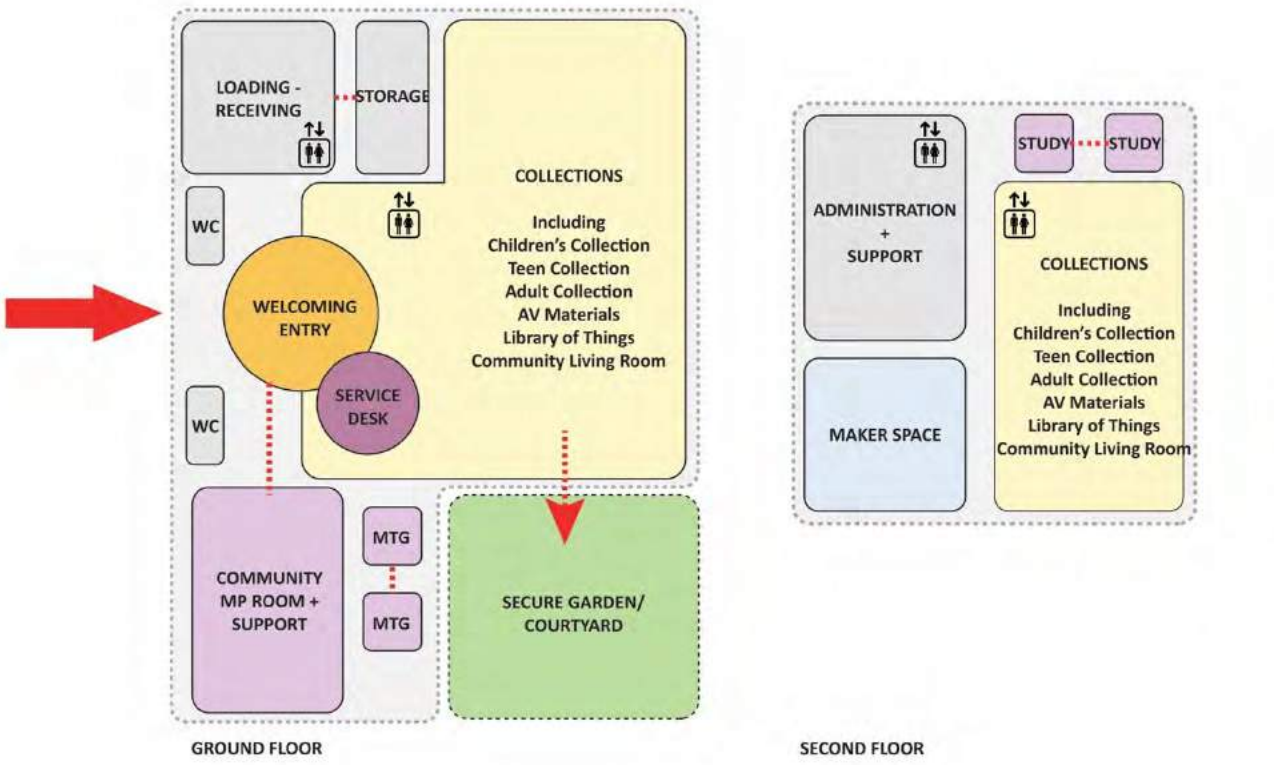
1-Storey Option



- The main entrance area in this proposal provides easy access to various key spaces such as a collections area, community spaces, and a library of things which is spatially connected to the collections area, as is the children's collection.
- A distinct multipurpose room for gatherings and community events has been included. Elements would include a flat floor, some AV infrastructure for presentations, adequate storage for flexible furniture, perhaps with independent access that can allow functionality outside of regular library hours. Many libraries offer this type of room adjacent to front entry vestibules.
- The Makerspace which can be noisier than the rest of the library is separated in the lower portion of the diagram.
- The administration is strategically positioned in the upper left section for passive observation of entry and library functions.
- Also note the availability of secure outdoor space in the lower right quadrant. (only accessible through the library).
- Quiet study rooms are located away from the children's area.
- Washrooms near the entrance or in a public shared entry zone may be positioned before security to the main library for those who may just need the WCs. Other washrooms will be needed through the internal floor plan as well.
- Administration and support are connected to loading-receiving and storage.

2-Storey Option

The 2-storey adjacency diagram shown below is designed to fit into a smaller building footprint if site area is a constraint.



- The general collections area would be split into upper and lower floors to achieve the smaller building footprint.
- The key for this flexibility would be to ensure the 2nd floor is designed structurally to support the loading of book stacks equivalently to the ground floor
- This concept provides primary public access spaces in the lower level. In this model, the Makerspace and administration are situated on the second floor.
- Both floor levels would have circulation materials and integrated reading lounges for comfortable study, reading and informal conversation. The upper level would likely be more oriented to adult collections, or a segment of the adult collection.
- Note this option has a symbol denoting elevator access in two areas (public and "back of house"). This will not necessarily require two elevating devices, but it may, depending on the final layout of the space and elements. The symbols and space arrangements are intended to show relationships, not a floor plan.
- Note that the designated study rooms may locate at the quiet side of the 2nd floor .

In both options, considering that public libraries are now warm, inviting public spaces for people experiencing homelessness, it is worth considering design that would make it comfortable for all. The configuration of elements near the entrance may require sizing as an entry lobby/lounge that meets needs for prolonged lingering. This will be an operational decision to adjust the positioning of the primary information/control desk.

E) Considerations for Mayfield West Branch

The site plan for Mayfield West we have reviewed appears preliminary and likely just shown for illustration by the subdivision drawings and approval documents. It may be necessary to adjust the site plan to accommodate a 30,000 square foot branch, depending on parking and zoning requirements.

A 30,000 sq. ft. branch may be possible, depending on the final design of the community centre, parking requirements and zoning regulations, and if there is more focus on different transit modes in the future and less focus on car-centric site design. Planning for a 30,000 sq ft addition in the design of the main building would be recommended in the development of the Mayfield West site plan.

Figure 6: Suggested Programmatic Zones to Address Broad User Needs, 1-storey Branch Approach

Figure 7: Suggested Programmatic Zones to Address Broad User Needs, 2-storey Branch Approach. Main Level

Figure 8: Suggested Programmatic Zones to Address Broad User Needs, 2-storey Branch Approach. Second Level

3.2.1.3. High-Level Facility Implications - Existing Rural Branches

The Caledon Public Library (CPL) system currently has 7 operating branches, 2 under construction, and 1 in early design/planning stages. To familiarize ourselves with the facilities the consulting team toured all existing branches. The library facilities toured range in size from very small (1,300 sq. ft.) to medium (15,000 sq. ft.) in settings that range from urban to fairly suburban/agricultural surroundings. The CPL team noted that a few of the smaller branches might get consolidated in some way, and plans for a few others to be renovated/revitalized were under way or recently completed. As a result, the CPL team requested the consulting team's focus on the existing Alton and Caledon Village Branches from a facilities point of view.

A. Alton Library Branch

A.1 Observation from visit to the Alton Branch at 35 Station Street, Alton

1. The library shares the facility with a community room and a kitchen, and occupies half the space
2. The library has no outdoor dedicated space that could be used for community programming activities.
3. The library overall has a dated interior design and material palette

4. There is very little seating area, with no study area or meeting space in the branch half of the space
5. The branch size overall is too small to serve even as a small neighborhood branch library
6. The branch lacks any space for creative maker activities, sound or video recording, etc.

Figure 9: Alton Branch Main Building Entrance

Figure 10: Alton Branch Reading & Collection Room

Figure 11: Adjacent Community Room

Figure 12: Alton Branch Site Aerial View

A.2 Proposed Improvements to Alton Branch

The Alton branch is one of the smallest branches in the CPL portfolio, and CPL does not own the building, but is a tenant in it. Feedback from the community noted that the branch was missing some of the spaces that are sought in a contemporary library such as Makerspaces, recording and video editing spaces. The CPL team noted that while expanding the library branch internally would eliminate the community room, and there is not a nearby space or a facility that could be used or rented for that, apart from the actively used school next door. It was a preferred approach to addressing some of the needs of the branch, illustrated in figure 13 below.

The option to expand the existing building was also explored (figure 14 below), because the site for the Alton Branch has available area for building expansion if care is given to avoid the surrounding dramatic grade changes. An addition could enhance the building/site relationship positively with emphasis towards exterior access. A more extensive renovation would also consider reconfiguration and reuse of the central, underutilized space as well as reexamining the spatial relationships to increase overall usage and functionality.

Figure 13: Improvements to Alton Branch to Expand within the Existing Building, Showing Existing Plan to the left, and proposed to the right

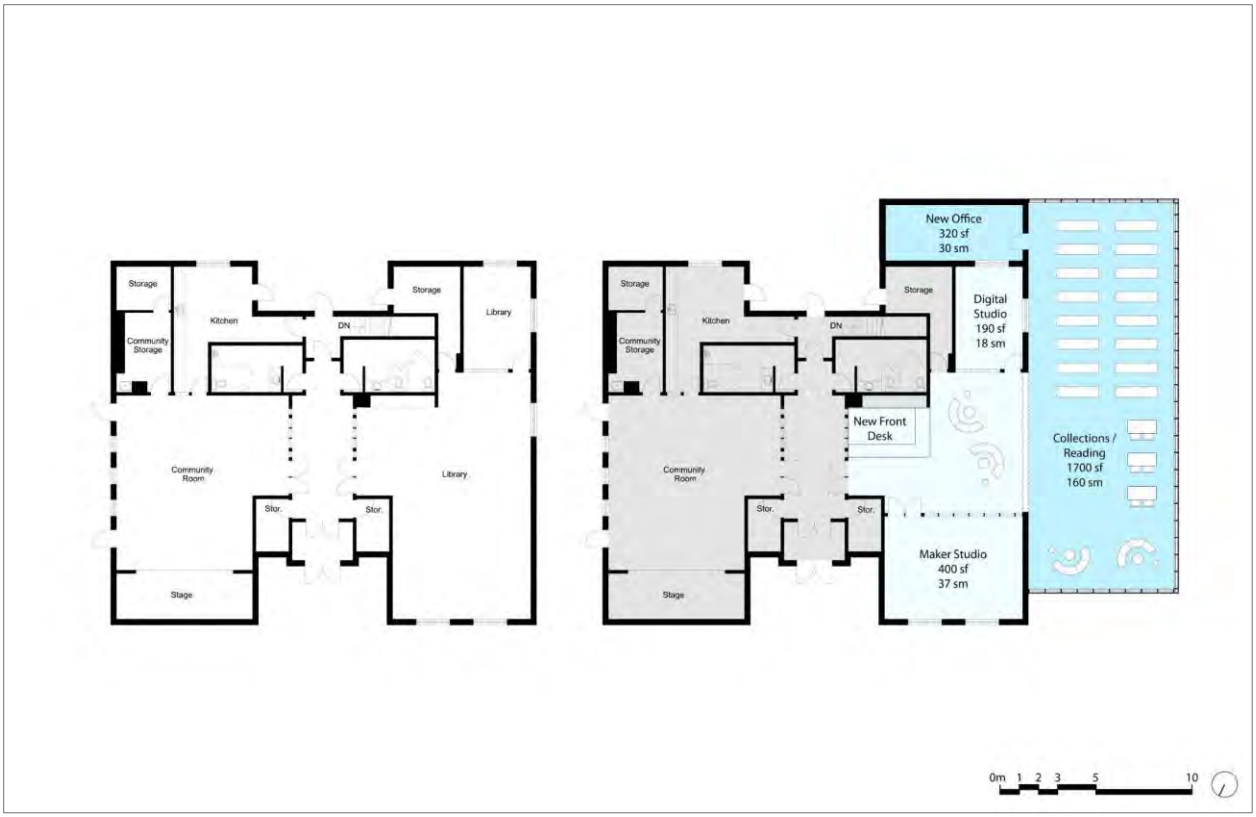


Figure 14: Improvements to Alton Branch to Expand Outside the Existing Building, Left: Existing Plan, Right: Proposed Plan

B. Caledon Village Library Branch

B.1 Observation from visit to the Caledon Village Branch at 18313 Hurontario Street (Highway 10), Caledon

1. While the library is located within a cluster of community resource buildings and sites, the connections between them are poor and dangerous for pedestrians. A consolidated site plan could alleviate these issues.
2. Accessing the branch when driving south on Hurontario Street (Highway 10) is risky and feels unsafe due to lack of a dedicated middle/left turn lane and high-speed traffic on the street.
3. There is no parking space against the building. Any visitor has to cross driveway after parking to get to the branch, which is a safety risk, specially to elder library visitors.
4. The main entrance is not welcoming and is just a small transitional space to take visitors to the stairs or elevators.
5. The accessible lift is key operated, and the key is kept with the branch staff, which limits people's ability to use the elevator independently in a dignified manner. Additionally, this limits the use of the elevator when the library is closed but the lower community room is being rented out to community groups and access is challenging as the doorbell only rings upstairs.

6. The main space has a dated interior design and material palette overall, including ceilings and floor finishes.
7. Some areas/spaces such as the office and the corridor behind it could be utilized better by having their walls removed to add to the library area.
8. The branch lacks any space for creative maker activities, sound or video recording, etc.
9. Despite having a very large site, there is no outdoor dedicated space that could be used for community programming activities.
10. The exterior of the building is dated and showing signs of brick veneer deterioration that might impact the building envelope soon.

Figure 15: Caledon Village Branch Main Building Entrance

Figure 16: Caledon Village Branch Reading & Collections Room

Figure 17: Caledon Village - Room Previously used as an Office

Figure 18: Caledon Village Branch Site Aerial View

B.2 Proposed Improvements to Caledon Village Branch

The Caledon Village Branch Library has an opportunity to improve through enhanced accessibility. A modest new entry area, at present grade level, would provide an inviting and active entry zone with easy access for all. Further measures to incorporate an improved

elevating device (self-operated) could open the two levels to all users. The most impactful benefits for users would be a refreshed site design that limits vehicle movement and offers safer, more inviting pedestrian movement. This may require a reconsideration of the Hurontario driveway access.

In review with the CPL team, it was agreed that what could be implemented sooner is an improved and renovated interior main space on the second floor, and that forms the basis for the work recommended to be done in a first phase (figure 19 below) to address some of the feedback received through the community survey results for this branch. Work to improve site conditions and add a new entrance addition facing Hurontario Street could be considered and is recommended in a phase 2 work program for this facility (Figure 20). As well an outdoor plaza for relaxation and programming purposes is suggested as an option. Given the joint use of this building, any such changes would need to be considered in tandem with the Parks and Recreation Strategic Plan. With the proposed design, the existing basement access would continue. If the basement needs independent access, the front addition would need re-arrangement. The proposed concept is for the front addition to be a form of indoor multi-use "porch" for the whole building offering an open lounge space for lingering, potentially a space for some short-term periodicals etc., like a public reading room.

Figure 19: Proposed Improvements to Caledon Village Branch in 2 phases

Figure 20: Proposed Building and Site Improvements to Caledon Village Branch in Phase 2

3.2.1.4. Sustainable Design

As a municipal public building that is an important community reference point and a cultural and societal infrastructure anchor, being at the forefront of sustainable design should be an important aspect of all future library buildings for the Town. With global warming on the rise, and as moving away from depending on fossil fuels seems increasingly prudent and is environmentally friendly, it is highly recommended that the new Town of Caledon library branches strive to integrate as much as possible Zero Carbon Buildings (ZCB) and Net Zero Energy Buildings (NZEB) principles, aligning with the Town of Caledon's Green Building Standards. The following are key principles that are recommended to be considered and evaluated in detail during design stages of each new building/new addition:

1. Incorporate renewable energy systems (e.g., avoid gas-fired combustion systems).
2. Design building with passive sustainable principles in mind.
3. Design building systems and select equipment that reduce the building's overall energy demand.
4. Design highly insulated building envelopes that reduce the energy required for mechanical systems while providing better occupant comfort.
5. Select equipment that is not reliant on fossil fuels as a primary energy source.
6. Emphasize selection of sustainable building materials with low carbon footprint.
7. Incorporate energy storage systems in the building.

8. If some measure such as renewable energy systems cannot be implemented due to capital budget limitations for a given project, install the minimum required infrastructure to allow adding such renewal energy systems as a retrofit afterwards.

3.2.1.5. Capital Cost Considerations

The following tables provide summaries of the capital costs for:

1. 30,000 sq. ft. 1 storey branch at Mayfield West (excluding site costs)
2. 30,000 sq. ft. 2 storey branch at Mayfield West (excluding site costs)

The construction cost of the Mayfield West branch would therefore be $28.04 million for a 1 storey branch (including both hard and soft costs). The soft costs include design and construction management. For a 2-storey branch, the estimated construction costs are estimated to be $25.86 million. (See the notes following Table 6 for assumptions and explanations of these costs). Note that these are estimated construction costs in current dollars and that an escalation value of 7% annually is recommended for planning construction in future years. (See note 8 following the tables). When the estimated costs of new collections and technology are added the total costs are estimated to be $30.02 million for a 1 storey branch and $27.84 million for a two-storey branch.

1 New Mayfield West Branch (1-storey, approximately 30,000 sq. ft.)

	Unit Rate	Quantity (SF)	Costs
Construction Cost	$ 630	30,000	$ 18,900,000
Contingency (10%)	$ 63	30,000	$ 1,890,000
Total Construction Costs	**$ 690**		**$ 20,790,000**
Soft Costs (35%)	$ 242	30,000	$ 7,245,000
Estimated Total Construction Costs			**$ 28,040,000**
Collections Costs			**$ 1,778,000**
Technology Costs			**$ 200,000**
Total Costs			**$ 30,018,000**

2 New Mayfield West Branch (2-storey, approximately 30,000 sq ft)

	Unit Rate	Quantity (SF)	Costs
Construction Cost	$ 580	30,000	$ 17,400,000
Contingency (10%)	$ 58	30,000	$ 1,740,000
Total Construction Costs	**$ 640**		**$ 19,140,000**
Soft Costs (35%)	$ 224	30,000	$ 6,720,000
Estimated Total Project Costs			**$ 25,860,000**
Collections Costs			**$ 1,778,000**
Technology Costs			**$ 200,000**
Total Costs			**$ 27,838,000**

The above costs assume a stand-alone facility. IF the Library facility is part of a larger complex including for example a recreation or community centre, there may be efficiencies from sharing common functions.

Tables 3, 4, 5 and 6 show order of magnitude capital costs for the following:

3. Alton Branch Interior Renovations = $1.15 million
4. Alton Branch – Interior Renovations and 1,722 square foot addition = $4.26 million
5. Caledon Village – Interior Renovations = $1.06 million
6. Caledon Village – Interior Renovations and 1,345 square foot addition = $2.9 million

3 Alton Branch (Interior Renovations)

	Unit Rate	Quantity (SF)	Costs
Construction cost	$ 350	2,207	$ 772,300
Contingency (10%)	$ 35	2,207	$ 77,200
Total Construction Costs	**$ 385**		**$ 849,500**
Demolition Allowance	included		
Soft Costs (35%)	$ 135	2,207	$ 297,340
Estimated Total Project Costs			**$ 1,150,000**

4 Alton Branch (Interior Renovation + New Addition)

	Unit Rate	Quantity (SF)	Costs
Construction Cost Addition	$ 1,300	1722	$ 2,238,900
Construction Cost Renovation	$ 500	1,238	$ 618,900
Contingency (10%)	$ 100	2,960	$ 296,000
Total Construction Costs			**$ 3,153,800**
Demolition Allowance	included		
Soft Costs (35%)			$ 1,103,830
Estimated Total Project Costs			**$ 4,260,000**

5 Caledon Village Branch (Phase 1: Interior Renovation)

	Unit Rate	Quantity (SF)	Costs
Construction cost	$ 350	2,045	$ 715,800
Contingency (10%)	$ 35	2,045	$ 71,580
Total Construction Costs	**$ 385**		**$ 787,380**
Demolition Allowance	included		
Soft Costs (35%)			$ 275,600
Estimated Total Project Costs			**$ 1,060,000**

6 Caledon Village Branch (Phase 2: Site Improvement and Addition)

Phase 2	**Unit Rate**	**Quantity (SF)**	**Costs**
Construction Cost (Addition)	$ 1,300	1,345	$ 1,749,135
Site Development Costs	$ 25	5,000	$ 125,000
Contingency (10%)	$ 133	1,345	$ 178,277
Total Construction Costs	**$ 1,433**		**$ 2,052,413**
Soft Costs (35%)			$ 718,300
Estimated Total Project Costs			**$ 2,900,000**

Notes:

1. A comprehensive growth plan provides an Order of Magnitude cost estimate because the design provided is at a very high-level conceptual stage. As a project develops through the various design stages from schematic design through design development and finally to construction documents, cost estimates progress with every successive design stage and become more accurate as the information provided becomes more detailed and comprehensive. The final, most detailed costing, called a Class A cost estimate, is usually undertaken at the 90% construction documents stage and is the most accurate.

2. **Order of Magnitude Costing:** (O of M costing) is a high-level estimate of a project's cost to complete. An O of M costing takes place very early in a project's life cycle, during the project selection and capital budgeting period and prior to project initiation in most cases. HST is not included in an Order of Magnitude Cost.

3. **Construction Cost:** means the price of all elements of the project designed or specified by or on behalf of the architect, through their sub-consultants, that define the construction of the building (including mechanical, electrical, plumbing, structural systems, landscape elements, and finishes)

4. **Project Cost:** refers to the construction cost plus all other **soft costs** associated with the project. They include costs such as permit fees, professional fees, furnishings and equipment, financing and legal costs, as well as moving costs. Soft costs range between 30-40% of the project's total cost for institutional public buildings depending on their nature, size and complexity.

5. The used unit price per square foot in this O of M costing does not factor in sustainability systems and strategies that achieve or are close to achieving Net Zero Building Performance. The estimates in this O of M costing only meets sustainability and energy performance requirements required by current building codes. However, it is clear that achieving Net Zero Building Performance levels and being carbon-neutral is an important parameter in the design of municipal public buildings, particularly new buildings, as that could set an example for sustainable design and construction, and because the industry is progressively moving towards that level of sustainability fairly quickly. A premium of an additional 25% is recommended to be added to the above provided cost estimates to reach this level.

6. The unit rate used above includes building and conventional site development costs where stated, and excludes costs of purchasing a site. Additionally, it excludes any special costs that could arise from the nature of the site as specific sites for the any proposed new branch are not identified at this stage.

7. This O of M costing reflects current construction market trends and prices in Q4 of 2022. As the construction industry has witnessed unprecedented market escalations and fluctuations due to the Covid-19 pandemic since March 2020, it is difficult to predict what the estimated costs of the proposed projects could be in the future. Hence cost of escalation is not factored in the estimated O of M costs provided above.

8. For capital budget planning purposes, it is recommended that a minimum of 7% escalation per year be added to the above provided costing estimates to determine any of the projects' O of M costing once an intended year for start of construction is established. For example, if a project enters the planning stage in 2023, but is not ready for issuance of construction tender/construction start until 2025, we would recommend an escalation factor of 21% (3 years x 7%) be added to the values presented above. **Cost estimating for a construction start beyond 5 years (2027) should be revisited with refreshed market data.**

9. **No cost of land is included in the above estimates.**

Open Access Costs

Open Access costs are high level estimates at this stage and costs will vary depending on the equipment required and configurations of each branch as well as the need for central monitoring capabilities[9]. There are also purchase and lease options associated with the technology.

[9] Cost estimates have been provided by Bibilotheca, a supplier of Open Access technology. Actual costs may require additional retrofitting of some of the branches to allow for successful implementation of the technology. Bibliotheca provided the technology at lower capital costs than those outlined above at Hamilton and Toronto Public Libraries, perhaps as a strategy to gain market share and broader acceptance of Open Access technology's, capabilities.

Ball park costs for Open Access technology and related software are $25,000 plus shipping and taxes per site. Yearly service and maintenance are estimated at $15,000 per year per site. Assuming there may be some retrofitting of existing facilities to allow for implementation of open access technology, an allowance of $35,000 per site is proposed for the capital costs.

If the Library chooses to add additional elements such as remote lockers and return bins, this could cost an additional $40,000 to $50,000 plus shipping and taxes.

In addition to the above costs, there may be additional costs to retrofit parts of each facility or install additional security features at each site to allow for open access. An additional allowance of $35,000 per site is recommended for retrofitting each site. Therefore, costs of open access are estimated to be $70,000 per site.

There would also need to be costs to implement an RFID/self-check system.

Self-Check and RFID Capital Costs

RFID and self-check capital costs are estimated as follows:

A vendor of this technology has quoted a mid-level self-check system can range from $10,000 to $19,000 — Assume 7 of these at an average cost of $15,000 = $105,000.

RFID gates can range from $10,000 or $11,000 for a single aisle gate with 2 panels (includes shipping and installation and a one year warranty). Prices are higher for more than one aisle. Assume 7 x $11,000 = $77,000.

RFID product tags are approximately $500 per roll of 2,000 with some discounting for volume purchases – Assume for 125,000 items the cost will be $32,000 approximately.

RFID pads are $1,200 each – Assume 1.5 per branch = $12,600.

The total of the above items is $226,600. For planning purposes, we would recommend a budget of $300,000 to implement self-check and RFID. This excludes staff time which can be considerable for the initial installation of RFID tags.

3.2.2. Stage 2 (2027 to 2031): New 35,000 sq. ft. Branch at Macville

3.2.2.1. Rationale for this Element of the Comprehensive Growth Plan

Macville is the site of a new mixed use community, Caledon Station, centred around a future GO station. There is an Official Plan amendment in place to plan for this new development and the developer is currently working on a zoning bylaw amendment and site plan.

Assuming a 30,000 square foot branch is completed in Mayfield West, this would result in a relatively short term surplus of 12,000 square feet of library space for Caledon. However, this surplus would be very temporary as rapid development is expected for the 5 year period 2032 to 2036. A library branch at Macville/Caledon Station will also help to serve residents of Caledon East as well as Bolton which is also expected to grow very quickly.

3.2.2.2. Estimated Capital Costs

No specific site has been selected for this branch, so the branch costs and site planning characteristics would be subject to the same bylaws and site planning constraints outlined earlier in section 3.2.1.

The tables below show order of magnitude costs for a 1 storey branch at Macville of $34.99 million and $32.45 million for a 2 storey branch in current dollars. These are in current dollars and will need to be escalated by 7% annually depending on the year of construction. Assuming the project is built in 2026, with a 7% escalator, then the estimated total costs are $49.1 million for a 1 storey branch and $45.5 million for a 2 storey branch. These costs exclude site acquisition costs. The costs below are for a stand-alone building. There may be some additional savings as being part of a shared complex, however, it is recommended that these costs be used for capital planning purposes.

1 New Macville Branch (1-storey, approximately 35,000 sq. ft.)

		Unit Rate	Quantity (SF)		Costs
Construction Cost	$	630	35,000	$	22,050,000
Contingency (10%)	$	63	35,000	$	2,205,000
Total Construction Costs	**$**	**690**		**$**	**24,255,000**
Soft Costs (35%)	$	242	35,000	$	8,452,500
Estimated Total Construction Costs (current dollars)				**$**	**32,710,000**
Collections				**$**	**2,075,000**
Technology				**$**	**200,000**
Estimated Total Project Costs (current)				**$**	**34,985,000**
Estimated Total Project Costs (2027)				**$**	**49,068,000**

2 New Macville Branch (2-storey, approximately 35,000 sq ft)

		Unit Rate	Quantity (SF)		Costs
Construction Cost	$	580	35,000	$	20,300,000
Contingency (10%)	$	58	35,000	$	2,030,000
Total Construction Costs	**$**	**640**		**$**	**22,330,000**
Soft Costs (35%)	$	224	35,000	$	7,840,000
Estimated Total Construction Costs (current dollars)				**$**	**30,170,000**
Collections				**$**	**2,075,000**
Technology				**$**	**200,000**
Estimated Total Project Costs (current)				**$**	**32,445,000**
Estimated Total Project Costs (2027)				**$**	**45,506,000**

3.2.3. Stage 3 (2032 to 2036): Expand Mayfield West by 20,000 square feet

3.2.3.1. Rationale for this Element of the Comprehensive Growth Plan

As noted in section 2.1, ward 2 will experience very rapid growth from 17,600 currently to 38,100 in 2031 (i.e., more than double) and 74,800 in 2041 (i.e., more than quadruple current levels). Accordingly, our recommendation in Stage 1 was for a 30,000 square foot new branch to be completed by 2026, followed by a 20,000 square foot addition in the period 2032 to 2036. An alternative would be to build a separate 20,000 square foot branch in the general vicinity as opposed to an addition to the recommended 30,000 square foot branch in stage 1. Given the uncertainty in projecting costs beyond the next few years, it is recommended that the costs below be used for planning purposes.

With the construction of an additional 20,000 square feet at Mayfield West, this will reduce the total library space deficit to only 2,000 square feet by the end of 2036.

3.2.2.2. Estimated Capital Costs

A two-storey addition in Mayfield West of 20,000 square feet would have ballpark costs of $33.9 million if constructed in 2031 and assuming a 7% annual escalator from current construction prices. The costs of new collections and technology would need to be reassessed and added to these costs.

Mayfield West Addition (2-storey, approximately 20,000 sq ft)

	Unit Rate	Quantity (SF)	Costs
Construction Cost	$ 580	20,000	$ 11,600,000
Contingency (10%)	$ 58	20,000	$ 1,160,000
Total Construction Costs	**$ 640**		**$ 12,760,000**
Soft Costs (35%)	$ 224	20,000	$ 4,480,000
Estimated Total Project Costs			**$ 17,240,000**
Estimated Total Project Costs (2033)			**$ 33,913,689**

3.2.4. Stage 4 (2037 to 2041): Expand in Bolton Area by 40,000 square feet

3.2.4.1. Rationale for this Element of the Comprehensive Growth Plan

Wards 5 and 6 are expected to experience considerable growth over the entire period. From 32,000 currently, to 57,600 in 2036 and 72,100 in 2041. The recommended additional space for Bolton is 40,000 square feet. If the site is not available for expansion it is possible that Caledon may wish to build relocate the current branch to a new 50,000 square foot library to meet its library space needs.

3.2.2.2. Estimated Capital Costs

A 40,000 square foot two storey branch would cost about $34.5 million if constructed today. Clearly, these costs would need to be revised as construction plans and timing become better known.

3.2.5. Funding Sources

A portion of the funds for the above projects is potentially available from development charges (DCs). Generally, development charges have followed the principle that new growth funds the infrastructure and community facilities required to support new growth, However, Bill 23 may affect the availability of DC funding for these projects in which case the Town and its existing residents will be responsible for a greater portion of future library project funding.

Caledon's 2019 DC Background Study updated in 2021 has taken into account the proposed 20,000 sq. ft. expansion of Mayfield West and the Caledon East Community Centre expansion as well as future strategic plans. The DC recoverable costs for library services are shown as $14.0 million in the current background study. The DC background study will need to be updated to take into account the DC fundable portion of the costs outlined in this Comprehensive Growth Plan.

An additional strategy that could be considered if the opportunity presents itself in future would be to take advantage of Section 37 of the *Planning Act*. Section 37 allows a municipality with appropriate Official Plan provisions to pass zoning bylaws allowing for increased height or density otherwise permitted by the Zoning Bylaw in return for provision by the developer of community benefits. The community benefits must be set out in the Zoning Bylaw. The increased height or density provided acts as an incentive for the developer to provide community benefits.

Often Section 37 is used as a tool for the municipality to provide affordable housing (or land for the housing), or rental housing or conservation of heritage sites on development lands. However, community benefits can also be used to provide community services and facilities, such as schools, recreation facilities and potentially public libraries as well as other community services that would be operated by non-profit organizations or government. In the City of Toronto's case, the community benefit space is to be provided on a 99 year lease on a turnkey basis with nominal rent (e.g., $2 per year), and with property taxes, occupancy and maintenance costs funded by the developer[10].

The use of Section 37 Community Benefits may be a strategy for the Town to consider in the next decades to help finance libraries and related spaces.

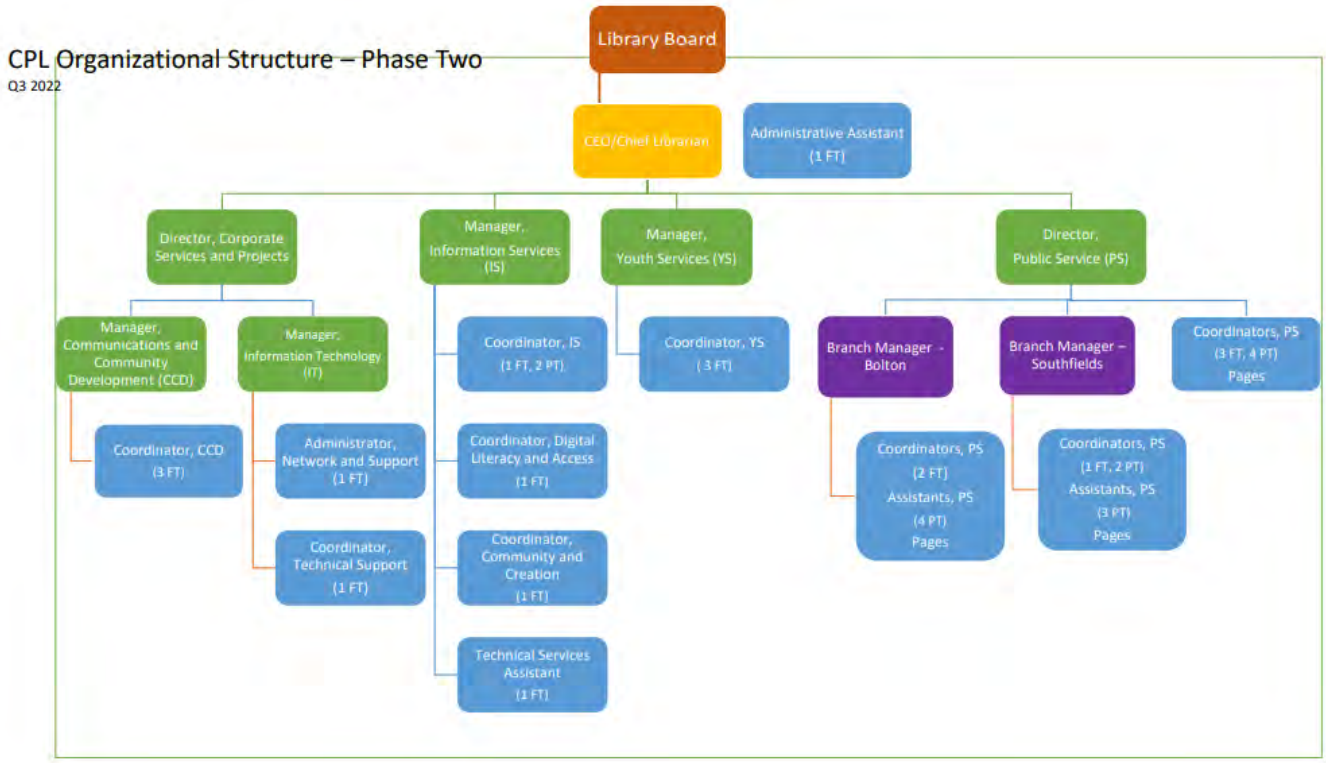
[10] For Toronto's Community Benefits implementation procedures see: https://www.toronto.ca/wp-content/uploads/2017/08/8f45-Implementation-Guidelines-for-Section-37-of-the-Planning-Act-and-Protocol-for-Negotiating-Section-37-Community-Benefits.pdf

3.3. Other Considerations

3.3.1. Staffing and Organization Structure Considerations

CPL's staff compliment is comprised of 28 full-time staff and approximately 33 part-time employees. These are distributed across five (5) departments: Public Service, Information Services, Youth Services, Information Technology, and Communications and Community Development. With the exception of Public Service, all staff work out of the Albion Bolton Branch, with a hybrid work model due to a lack of space at the library branches. Most smaller branches are currently staffed by only one staff member at any given time.

The current Organizational Structure is as follows:



Based on the 2022 (up to Q3) circulation of materials, the Southfields Branch has now surpassed the Albion Bolton branch in library use. However, it should be noted that the Bolton branch was closed for construction until late June 2022. Both libraries are open 60 hours per week. The Southfields Branch has more visitors. This is creating a pressure on staffing at Southfields. The Library's 2023 budget has proposed increased investment in staffing at the Southfields branches to meet the increased demand and provide additional hours of operation at both the Albion Bolton and Southfields Village branches in response to community growth. Responses in the staff survey support the concern about the workload at the busy branches. In

order to support staff retention and recruitment in the competitive job market, the Library has requested extended health benefits for permanent part-time staff in the 2023 budget.

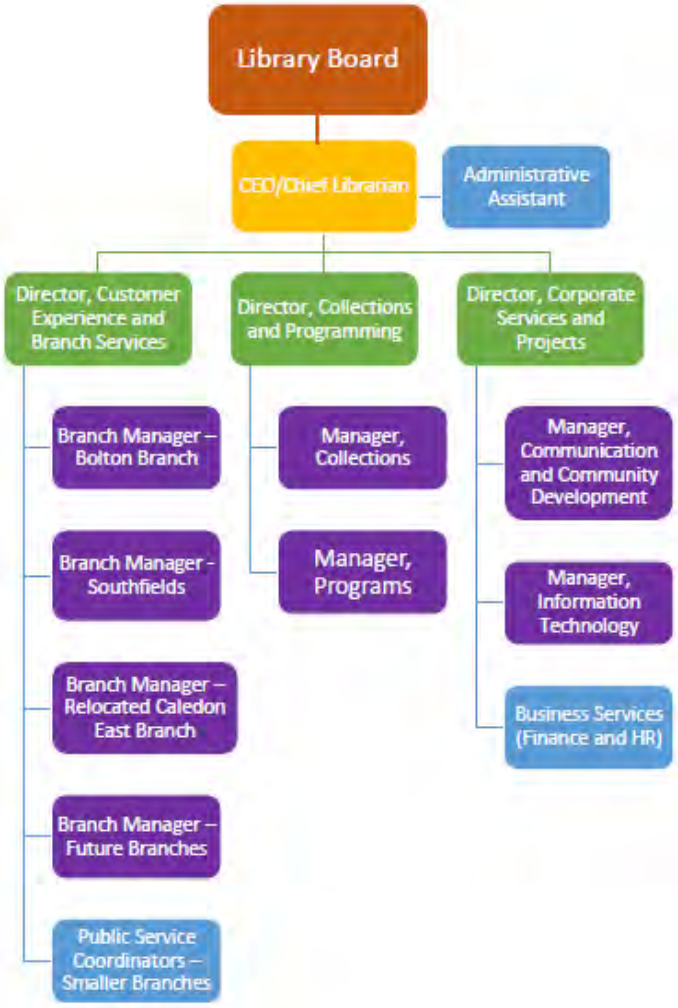
It is anticipated that when the relocated Caledon East Branch opens in the fall of 2023, it will also be well received and well used by its local community. However, as the Caledon East branch was a joint library with the Robert F. Hall Catholic Secondary School, staffing was not shared with the school , as the school had its own Teacher Librarian and Tech with only minimal crossover of services. School staff did not typically serve members of the public. The Library's 2023 budget has made provision for the change in service levels anticipated with the new Library in the community centre.

The Margaret Dunn Valleywood Branch will be reimagined into a Collaboration Studio housing a Makerspace, recording, studio, and special collections supporting this technology, entrepreneurs, and local businesses. A Creativity Studio will also be located adjacent to the new Caledon East Branch. Both of these initiatives will require specialized customer service and assistance in the use of the technologies. These positions have also been proposed in the Library's 2023 budget.

One action area in the Strategic Plan is ***"Ensure the library has the staff capacity to meet the needs of a growing Caledon."***

The Library is considering a new organizational structure as follows:

PROPOSED NEW ORGANIZATIONAL CHART



The above model will bring together the Information Services and Youth Services portfolios into one pillar, Collections and Programming, resulting in staff being generalists serving a variety of ages and needs. This will provide flexibility in service delivery to respond to changing community needs. Programming will be done at a system level as well as locally at the branch level.

As the Library's branches are expanding and new ones are added, they can be categorized as follows:

Resource Branch	Albion Bolton (eventually Mayfield West) Including administrative and support functions in either or both
Urban Neighbourhood Branch	Caledon East Southfields
Rural Neighbourhood Branch	Alton Caledon Village Inglewood
Collaboration Studio	Margaret Dunn Valleywood

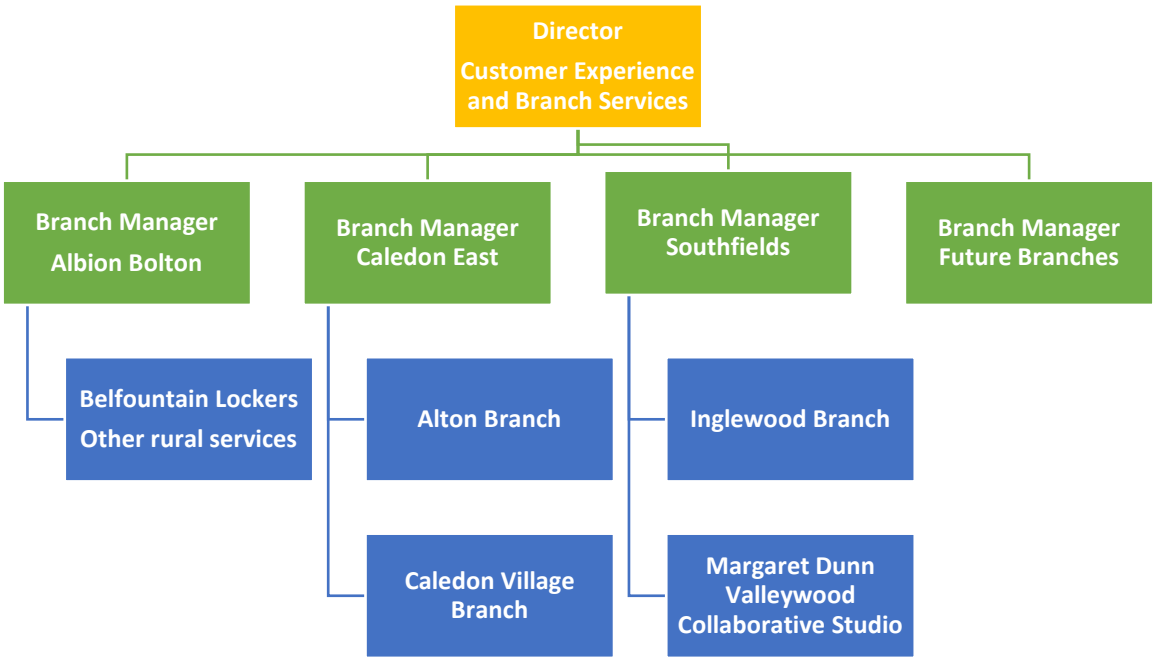
Other future branches will likely be either Resource Branches or Urban Neighbourhood Branches as the population growth is projected to happen in the urban areas.
The large branches will have their own Branch Managers, and future branches will be large and follow this model. The small branches will report directly to the Director of Customer Experience and Branch Services or have a separate manager.

Another model could have the large branches take responsibility for the small rural branches, thereby strengthening staff connections and enabling cross training.

For example, the Southfields Branch could include responsibility for Margaret Dunn Valleywood and Inglewood branches, Caledon East could include Caledon Village and Alton, and Albion Bolton could look after Belfountain and other rural library services as well as Interlibrary Loan and Visiting Library Services. Based on demographic projections, it is unlikely that there will be additional rural branches.

Demographic research and staff comments also support the notion that it is an asset to recruit staff who reflect the main demographic communities around the branches.

ALTERNATIVE BRANCH MODEL



A variation on the above could be to have the Margaret Dunn Valleywood Branch be part of the Caledon East team as the Caledon East Branch will have a Makerspace as well.

Other Staff Considerations

The Library's Strategic Plan contains the strategic action, ***"invest in the development of all staff to build the necessary knowledge, skills, and confidence to guide and support library users."***

The CEO's monthly report to the Library Board regularly reports on the learning opportunities which staff had participated in. In the staff survey, 97% reported that they had the training and technology to work effectively.

Recommendations:

- Monitor community use of each branch, community growth, and adjust/increase staffing to meet demand through "change in service level" budget requests;
- Adopt a service model of generalist public service so that staffing flexibility can adapt to changing needs;
- Adopt a "branch team" model to pair urban larger branches with the rural branches;
- Offer generalist library training opportunities, e.g., the EXCEL program for front-line staff and the Advanced Public Library Leadership (APLL) program, both offered by the Ontario Library Service;
- When recruiting new positions, seek individuals who are representative of the local diverse populations and can speak their languages, e.g., Punjabi, Hindi, etc.

3.3.2. Technological Considerations

3.3.2.1. External Technology and Online Services Offered to the Public

Emerging technology and generational change have accelerated the expectation for on demand service, timely feedback from providers, and mobile 24/7 library delivery. There is additional pressure with the fast-growing population and an increase in new residents from neighboring communities who bring different expectations of services. CPL is well positioned to add new and innovative services to its expanding population with technology. There are few constraints. It has a good budget, support from the Town, well-trained staff, and a new IT manager. It is proactive in keeping on top of technology trends with tech-savvy staff, creative programmers, and STEM programs for children.

Existing services include computer workstations, print/copy/scan service, free WiFi, accessibility devices, tablets, digital display screens, , plus an extensive Digital Library collection. Lendable technology and the Library of Things provide Chromebooks, Launchpads, video gaming software, GoPros, and Raspberry Pi kits.

Virtual branch - the website https://caledon.library.on.ca serves as a virtual branch open 24/7 with marketing of resources, services and events. It offers online membership with Temporary Instant Card registration for Caledon and neighbouring residents. A new online catalogue https://caledon.bibliocommons.com was launched and includes enhanced searching, user reviews and ratings, display of booklists and promotions, and direct downloading of digital media including eBooks and eAudiobooks, magazines, and more. A mobile app features self-service, and multiple language interfaces were recently added.

Self-service – CPL offers convenience with self-serve features: a mobile device app for search and renewals; online registration for library programs and temporary instant cards to access digital resources; online Makerspace equipment booking system is coming; pay stations for printing; Print from Anywhere Service. CPL does not currently offer any self-check.

Training – CPL's strategic goals are to provide basic technology literacy and showcase innovative technology. Library staff stay nimble with hands-on sessions with new devices, group training sessions, and software that can be customized with local content.

Basic training for technology literacy for the public is provided by tutorial software, Tech Savvy Teens, Tech Help @ Home for one-on-one sessions, and space for Community Services Cyber Seniors. Digital Literacy staff create guides and videos which are made available on the web to share knowledge and market CPL services.

Internet connectivity is unreliable in some rural areas. Until SWIFT (Southwest Integrated Fibre Technology) completes its implementation of a rural fibre-to-the-home project, poor connectivity in some areas of the region creates inequities. Recently, closures during the pandemic emphasized the difficulties faced by seniors and students. To assist users, CPL offers

lendable hotspot connection devices, Connecting Caledon Seniors kits, and Community Connection kits in partnership with community organizations. Wireless networks have also been extended to the parking lots to allow for access outside of regular hours of operation.

3.3.2.2. Internal Technology Needs of the Library Operation

CPL is fortunate to have a good IT budget, new IT staff with vision, support from the Town, and well-trained staff comfortable with technology.

Support - a new IT Manager was hired, providing sufficient coverage for IT services, with hardware and software support throughout library open hours. The IT staff are a tech expertise resource for troubleshooting office administration and library-specific applications, network, security, plus backup during staff absence. They also support library devices for the public. As the organization grows, IT staffing levels and capacities should be monitored to ensure they are effective.

Other staff are responsible for administration and configuration of the SirsiDynix ILS and BiblioCore. Support coverage is enhanced with offline circulation to provide service if the system is unavailable.

Collaboration - a Strategic Plan goal is to strengthen relationships with other organizations, especially helpful for IT planning. A joint review of technology services in tandem with the Town has been funded and will be completed in 2023. The consultant's findings will highlight any opportunities for improved alignment, network integration and joint procurement.

CPL is an active member of OLC, a library consortium that provides discounts on software, hardware, and applications. It works with local organizations to provide technology services to library users.

3.3.2.3. Recommendations for Future Technologies

The Library can use its expertise and insight to promote innovative uses of technology to the community and provide service beyond library walls.

Technology plan – a formal plan will support the Library's strategic goals with IT planning for maximum impact and community development. The needs and expectations of public and staff can be assessed to develop a multi-year IT pathway with a list of goals and tasks for the IT Department to support and manage access to service and clients using web services and data.

Many parts are already in place, such as a recent assessment of the Library's IT operations and network infrastructure, TPL Bridge and Edge project, Risk and Compliance assessment, and a hardware replacement plan. There is a plan to create an IT Steering Committee. The formal plan can include the following components:

- Provide ongoing training resources for staff and patrons.
- Review and implement support tools. Perform a network security audit.
- Investigate available SirsiDynix modules for operational efficiencies.
- Use OLC consortium membership to review additional Bibliocommons integrations. Continue to expand services on the website.
- Leverage the findings of the Joint IT Services Review.
- Improve and expand the fibre and wireless networks.
- Continue positive working relationship with municipal partners, community groups and explore collaboration on technology projects.
- Review the model of a shared ILS in the OLC. Consider the needs of a growing Caledon and whether a standalone system is a better option.
- Include capital and operating costs of planned implementation in the Technology Plan.

IT support tools and operations – with a formal plan, the IT Department will have a solid foundation to build innovative service, giving staff the tools to be proactive instead of reactive. With a mix of IT staff managing access to service and clients, data and web services, the following support tools should be integrated within the Information Technology Plan and considered as CPL moves forward with the recommended introduction of self-check and open access services.

- An enhanced remote monitoring system provides system-wide troubleshooting.
- Applications on local servers can be moved to a cloud subscription, shifting responsibility for backups, upgrades and availability over to the vendor. This eases the implementation of planned upgrades such as Microsoft 365.
- A security audit will address weaknesses in the internal network.
- Documentation support will strengthen CPL's knowledge base, policies and procedures, and succession planning.
- Spotty connectivity requires mobile solutions to expand service beyond physical boundaries. Staff can use hotspots from mobile locations, and SirsiDynix has a web-based application to access to the system from anywhere.
- Additional SirsiDynix ILS features provide operational efficiencies to manage rapid growth, such as Acquisitions EDI for direct-to-vendor orders, automatic renewal of loans, membership term extension, SMS text messaging for user notices, inventory.

Emerging technology - examples of innovative technology include recording equipment, creativity software, 3D printer and laser cutters. CPL will soon launch two Makerspaces – the Margaret Dunn Valleywood Collaboration Studio and the Caledon East Creativity Studio. These facilities and services can support the positioning of the Library as the "maker" expert in Caledon.

Self-service options offer convenience and reduce wait time for users and allow staff to focus on value added services rather than simple materials handling. Self-check stations are planned,

and implementation of RFID can open the way to enhanced services in the future, such as additional hold lockers, and new kiosk vending machines. Outreach options promote technology beyond library walls with a pop-up library at community events, mobile Makerspace, or pop-up learning lab. New mobile library vans can engage users with featured materials, programming, WiFi, computers and printers at gathering places around Caledon.

Integrations for CPL's BiblioCore platform include more eResource collections, and a third-party chat service that provides online assistance to and quick response to queries from library users using BiblioCore.

Digital collections - the use of electronic service subscriptions should continue to be regularly reviewed. Online resources will provide enhanced value when tied into library programs and collections, and when linked by other Caledon organizations. For example: library clubs for art, knitting and writing with CPL's subscriptions to CreativeBug and LinkedIn Learning; Caledon programs serving small business and employment with BrainFuse JobNow and LinkedIn Learning; local organizations assisting newcomers to Canada with Canadian Citizenship Course and Road to IELTS (International English Language Testing System).

3.3.2.4. Open Access During Unstaffed Hours

To improve services in the rural branches, it is recommended that the Library implement Open Access technology which would allow for an extension of the hours of operation at each of the rural branches and potentially the urban branches in the longer term. The primary goal of an Open Access system is to provide more access to Library users during unstaffed hours using self-service and open access technology[11]. It uses secure card access to library collections for hold pickups, self-check stations, Wi-Fi, quiet study spots and computer workstations, and controls equipment such as door access and barriers, cameras, lights, kiosks and security alarms.

There are model implementations at smaller branches in Hamilton and Toronto, and both reported a tripling of open hours for registered users and increase in circulation and program attendance. Initial concerns about security and theft were allayed after the service was implemented. The vendor provided the entry keylock and PA speakers; Hamilton and Toronto provided the security cameras, monitoring service and telephone for users.

The Open Access system should be piloted first at Inglewood, and if successful, extended to Caledon Village and Alton branches. In the longer term, if successful, it could also be provided at the urban branches. Provision should be made for RFID to allow self-check stations.

[11] Bibliotheca's Open+ Access system is a vendor providing this technology in small branches in Hamilton and Toronto Public Libraries.

3.3.3. Future Offering of Programs and Services

The PRIZM demographic assessment of Caledon Public Library cardholders provided valuable information on which to base programming to target groups such as families and ethnically diverse community groups, especially the Asian and South Asian communities. This was supported by the results from the community and staff surveys, where there was an appetite for more programming for all ages and groups at all branches.

Several survey respondents noted that they would use the library more if they knew what was going on. The Caledon Public Library promotes programs and services through its website, an electronic newsletter, and social media.

The Caledon Public Library is on trend for innovative library services such as Makerspace and emerging technologies in the upcoming launch of the Margaret Dunn Valleywood Collaboration Studio and the planned Creativity Studio at the new Caledon East Branch.

There is interest in alternative service delivery mechanisms such as extended access at library branches after regular library hours (such as Open+ Access - see section 3.2.1.5.), a bookmobile, holds lockers, and book kiosks. Caledon Public Library already has a holds locker at Belfountain, where there formerly was a small branch, although statistics indicate that there is not a significant use of this service.

Bookmobiles traditionally functioned like a (small, expensive) branch on wheels. One advantage of them is the flexibility to adjust to meet changing needs in the community, and serve populations who cannot travel to a branch. More commonly, public libraries address outreach needs through a smaller vehicle such as a van serving many purposes as a mobile library, which can travel to remote communities for special events or activities, providing some library resources, high speed Wi-Fi, computers, programming, cardholder registration opportunities, and have a high profile for the Library.

Recommendations

- Increase staffing in order to expand program offerings at all branches relevant to the local community
- Explore additional ways of promoting the Library's programs and services
- Expand collections, particularly in Asian and South Asian languages
- Investigate alternative service delivery options (see section 3.3.4)
- Investigate the investment of a mobile library for outreach opportunities and to serve rural areas (see section 3.3.4)

3.3.4. An Approach to Alternative Service Delivery (ASD) in Caledon

In addition to developing a plan for additional 'bricks and mortar' (i.e., branches) to serve the rapidly growing population of Caledon, this Comprehensive Growth Plan also examined

alternative delivery methods of providing services to smaller and more rural communities where a permanent branch may not be warranted. This approach starts by identifying those smaller hamlets and communities throughout the community where such services may be needed.

The table below shows the identified hamlets and smaller branches in each ward of the municipality, and the approximate distance of each from one of the existing branches of the system.

Ward	Hamlets Currently with No Library Branch	Other Settlements in Ward
Ward 1	• **Melville** *(5 km. from Alton)* • **Cataract** *(6 km. from Alton; 4 km. from Belfountain)* • **Cheltenham** *(6 km. from Inglewood)* • **Claude** *(4 km. from Inglewood)* • **Campbell's Cross** *(6 km. from Southfields Village and 6 km. from Margaret Dunn Valleywood)*	• **McLeodville** *(8 km. from Alton)* • **Brimstone** *(2 km. from Belfountain; 9 km. from Inglewood)*
Ward 2	• **Terra Cotta** (on Ward border) *12 km. from Inglewood; 14 km. from Margaret Dunn Valleywood))* • **Victoria** (on Ward border) *5 km. from Margaret Dunn Valleywood; 6 km. from Inglewood)*	• **Rockside** *(7 km. from Inglewood)*
Ward 3	• **Mono Road** *(3 km. from Caledon East)* • **Tullamore** *(8 km. from Southfields Village)* • **Sandhill** *(6 km. from Caledon East)* • **Wildfield** (on Ward border) *9 km. from Albion Bolton*	• **Kilmangh** *(6 km. from Caledon East)*
Ward 4	• **Lockton** (on Ward border) *5 km. from Caledon East* • **Palgrave** *(15 km. from Caledon East)* • **Mono Mills** *(14 km. from Caledon East)*	• **Speersville** *(10 km. from Caledon Village)*
Ward 5	*** geographically small and essentially urbanized ***	
Ward 6	*** geographically small and essentially urbanized ***	

There are 16 hamlets and smaller settlements 5 km. or more from a 'full service' library branch (i.e., excluding Belfountain, which is simply holds lockers) and thus could be considered candidates for some sort of alternative service delivery. One approach to development of an alternative service delivery system would be to consider a three- tier approach, where, for example, hamlets and settlements might be thought of in the following categories:

First Tier: communities that are within 5 km. of an existing branch, and therefore considered to be within the catchment area of that particular branch – because of this relative proximity they would be considered not 'eligible' for some form of alternative service delivery system;

Second Tier: communities that are between 5 and 10 km. distant from an existing branch and therefore at some disadvantage in accessing library services; these communities might

be eligible for some form of periodic service such as might be provided by a bookmobile or book van service, periodic pop-ups, etc., to supplement their existing access; and

Third Tier: communities that are 10 km. or more from the nearest branch, and that might accordingly be eligible for some form of more permanent service such as a temporary branch in a vacant retail storefront, arrangement with an existing retailer, book kiosks, hold lockers, etc.

The classification of existing hamlets and smaller communities into this three-tier system would be as follows:

First Tier (5 km from an existing branch)	**Second Tier** (5 to 10 km from an existing branch)		**Third Tier** (more than 10 km from an existing branch)
- Claude - Brimstone - Mono Road	- Melville - Cataract - Cheltenham - Campbell's Cross - Victoria - Tullamore - Sand Hill	- Wildfield - Lockton - McLeodville - Brimstone - Rockside - Kilmangh	- Terra Cotta - Palgrave - Mono Mills - Speersville

In Stage 1 of the growth trajectory for the development of physical branches, an alternative service delivery strategy along the lines of that discussed here should be developed. This should consider the use of both a portable service of some type to service some or all of the Tier 2 hamlets and communities, as well as more permanent means of providing some form of service to the Tier 3 communities identified. This alternative service delivery plan should be adjusted and refined as required in each of the successive stages 2, 3 and 4 of the growth trajectory as required.

Costs of Alternative Service Delivery

There are a variety of mobile services that are used by public libraries in Ontario. Bookmobiles are popular for libraries serving wide geographic areas such as Caledon. Prices can range from approximately $80,000 for a small sprinter van to more than $750,000 for a full-sized bus. More recently, libraries have been interested in investigating green vehicles to help promote eco-friendly solutions. These can add to the overall capital cost as well as the degree of customization that the purchaser specifies.

Operating costs will include staff, collections, internet access, maintenance, insurance and fuel. Like the holds lockers and kiosks, bookmobiles are a delivery mechanism for materials, stopping for a couple of hours at each location, and do not generally provide the community hub and "people" space and programming that branches do. However, the vehicles can also be used to visit community facilities such as daycares, senior residences and neighbourhoods not near a public library branch on a weekly or biweekly schedule.

Smaller mobile services can also be procured to help deliver books and services to the public as well as to maintain a highly visible marketing presence. Typically, these vehicles are delivery vans that are 'wrapped' with high visibility marketing materials. These vehicles (as with the larger bookmobiles) can also be used to have a library presence (supported by staff activities) at community events and non-library public spaces. The vehicle can therefore be used to help promote marketing and outreach activities, for example, by visiting key sites, attending events and interacting with the community, supporting popup activities, and promoting the Library. In this latter case, the vehicle's emphasis is more on providing a delivery vehicle and supporting marketing efforts, as opposed to offering more library materials and services that could be provided in a larger style bookmobile.

Pricing for remote lockers from Bibliotheca, a vendor of holds lockers, was recently quoted as follows:

solution	**Budgetary price**	**Year 2 Service and maintenance**
remoteLocker 2 x 15 tower + 1 central	$39,000 + shipping + tax	$4,994
remoteLocker 2 x 15 towers + 4 locker and return bin + central tower	$48,000 + shipping + tax	$6,242

The above costs do not include staffing and transportation which is estimated to be approximately 1 hour per day. However, staff time will vary based on the Library's intended use, location and user behaviour. There are also lower cost options the Library may wish to consider which would not require investment to the same degree in vendor technology and servicing.

Book lending kiosks are another option to consider which are in use in many libraries and are estimated to start at approximately $30,000; prices will vary depending on the quantity, implementation requirements, degree of customization and service agreements. Operating costs are estimated to be approximately $3,500 annually for service and maintenance. Staffing and transportation costs would need to be added to this. Kiosks can also be used for holds pickups. Again, staff time will vary depending on the Library's intended use, location and user behavior.

4. Recommendations and Implementation

This final Section of the Report outlines suggested implementation considerations for the Comprehensive Growth Plan. First, a **summary list of recommendations** is presented, according to subject areas, and numbered for easy reference. Next, **timing and critical path matters** are presented, followed by **high-level resource requirements** (human and financial). Suggested **targets, milestones and outcomes** are discussed so that progress toward this Comprehensive Growth Plan can be followed and measured. Finally, a high-level **conclusion** is presented, outlining the importance of this Comprehensive Growth Plan process to the future of the community.

It should be noted throughout this section that this is a **suggested** implementation plan only. Given that the time period under consideration here is *twenty years* out, there will inevitably be some changes seen to the assumptions made here. Population growth will be faster, or slower, than what is projected here. New or revised provincial legislation may alter the situation. Fresh opportunities will arise, and unforeseen challenges will emerge. Accordingly, the implementation plan presented here should be continuously monitored and reviewed, and changes made as they become necessary.

4.1. Summary of All Recommendations

Recommendations are made in four areas:

A. Branches and Facilities
B. Organization and Staffing
C. Programs and Services
D. Technology

As this is a Comprehensive Growth Plan, as opposed to a service review or strategic plan, the emphasis in the recommendations made here is upon the size and location of physical facilities which will help provide the framework for the CPL's plans in the Town's future capital budget. Various implications that follow from the physical facility recommendations including organization and staffing, programs and services, and technology, are outlined below.

A) Branches and Facilities:

Recommendation #1: Adopt the four-stage growth plan: Caledon is a rapidly growing municipality and will need to expand its library spaces significantly in the coming two decades in order to provide adequate library services to its growing and rapidly diversifying population. This Report outlines a four-stage growth plan in five-year increments over the next twenty

years to match the growth trajectory of the municipality. Each stage adds a major new branch to the community, in different locations to match anticipated population growth. In summary, this plan is:

Stage in the Growth Trajectory	Key Developments	Proposed Amount of Space Added to Inventory
Stage 1: 2021 - 2026	• refurbishment of Ward 1 branches (anticipated to add about 1,000 sf at Alton branch) • development of new 30,000 sf facility at Mayfield West (an increase of 10,000 sf over the previous plan) • relocation of Caledon East Branch to 9,569 sf at Caledon East Community Centre (CECC) resulting in a net addition of about 2,000 sf • implement self-service and open access to deliver services to branches after open hours	33,000 sf
Stage 2: 2027 - 2031	• 35,000 sf at Macville/Caledon Station	35,000 sf
Stage 3: 2032 - 2036	• 20,000 sf expansion in Mayfield West	20,000 sf
Stage 4: 2037 - 2041	• 40,000 sf expansion of Albion Bolton branch or construction of secondary facility	40,000 sf

It is recommended that the Board and Council adopt this generalized trajectory as a fundamental planning principle for library facilities going forward over the next two decades. While it is understood that the specific details of planning and even size will likely be modified as each stage comes around (particularly in the later stages) this should nonetheless be considered as a general overall planning guide.

Further, new construction and/or alterations to existing facilities should achieve high performance standards for environmental sustainability and energy conservation. New Library sites and structures, serving as important community reference points, should be at the forefront of sustainable design and be exemplary, invigorating and healthy environments. It is highly recommended that the new library branches for the Town of Caledon strive to integrate Zero Carbon Buildings (ZCB) and Net Zero Energy Buildings (NZEB) principles in order to align with the Town's green building standards.

Recommendation #2: Implement self-service and open access to deliver service to branches after open hours: Implement RFID to support these technologies as required. An

RFID project requires equipment such as tags and handheld and/or gate readers, plus costs for software, network configuration, cabling, electrical, space configuration and annual maintenance. Additional staff hours are needed for training and implementation. Once complete, self-check workstations and open access technology can be installed.

Recommendation #3: Adopt and implement interim service delivery modes until new branches developed: Until new bricks-and-mortar branches are developed in the locations identified in the four-stage plan, interim service provision should be offered through alternative delivery mechanisms such as a bookmobile / mobile library, holds lockers (such as those currently at Belfountain), service kiosks, open access locations, etc. As well, the possibility of leasing temporary branches in retail storefronts should be considered. These mechanisms can also be used to provide additional services in rural areas. A specific alternative service delivery plan should be developed in parallel with the four-stage plan for new branches recommended here.

Recommendation #4: Develop an Alternative Service Delivery Plan for Underserviced Areas: Even with the growth plan for new branches, there will still be some hamlets and smaller communities particularly in the northern end of the municipality that will not be within reasonable proximity of a branch. Accordingly, parallel to Stage 1 of the Growth Trajectory for new branches, an alternative service delivery plan should be developed for hamlets and smaller communities in these rural and more remote areas where it is more difficult for populations to access library services. This report has identified 16 potential service points in this regard and suggests that a number of options be investigated and considered for suitability including open access systems; pop up locations; temporary branches in retail vacancies and in existing commercial establishments; book kiosks and lockers; and a mobile library.

B) Programs and Services

Recommendation #5: The development of new and innovative in-library programs and services that respond to community need should be a staffing priority: CPL has a long track record of continuously developing new and innovative programs and services to respond to evolving community need. The community survey showed that there is a very strong recognition and appreciation of its efforts over the years in this regard. As well, however, the survey showed that there are many new ideas and suggestions for additional programs and services. (Appendix A to this Report contains these suggestions in greater detail.) To some extent these will differ from branch to branch as they serve the needs of the immediate local community. The suggestions made here should be reviewed by the staff in their on-going efforts to provide new and effective programming to the community, particularly to respond to community demographic change and as we emerge from the pandemic. **But, fundamentally, it must be recognized that new programs and services to meet the needs of the growing community will require additional staff resources. This should be a major staffing priority in the coming decades.**

Recommendation #6: Continually develop virtual and online programs and services, also a staffing priority: The pandemic has viscerally underscored the importance of providing online and virtual programs for the community. Caledon's provision of its Digital Library acknowledges the unique aspects of this kind of programming and draws greater attention to its online service offerings. Even with a return to in-branch programming, it is anticipated that demand for on-line programs will continue to grow. As with physical services, CPL should continually monitor demand and continue to provide online services and recognize that the development of additional online and virtual programming will also require future investment of staff time and resources. (Again, the community survey results shown in Appendix A contain a summary of suggestions in this regard.) **As with the previous recommendation, this should be a major staffing priority in the coming decades.**

C) Organization and Staffing

Recommendation #7: Implement new organizational model: A new and more effective organizational model should be adopted where there are three direct Director-level reports to the CEO / Chief Librarian Position: 1) a Director of Customer Experience and Branch Services; 2) a Director of Collections and Programming; and 3) a Director of Corporate Service and Projects. These three areas cover all aspects of external and internal operations of the library system and, as the library system becomes larger and more complex with community growth, the simpler and more flexible model will more effectively accommodate change.

Recommendation #8: Implement a service model of generalist public service: Accompanying the new organizational model, all front-line staff should adopt a generalized customer orientation model so that there is a core level of public service that all users and members of the general public can expect. While this is 'generally understood' to be the model and approach followed by staff, there is not an explicitly written or articulated documentation example of what this model entails. Accordingly, such a model should be articulated, and provided to all staff (current and new incoming staff.) This will provide a more consistent level of service to the general public as well as providing greater staffing flexibility to adapt and respond to changing needs. This approach should align with CPL's new organizational structure and would include, for example, offering generalist library training opportunities for management or staff with growth potential, e.g., the EXCEL program for front-line staff who don't already have a Library Tech diploma and the Advanced Public Library Leadership (APLL) program for management team members or staff who have management potential, both offered by the Ontario Library Service. Existing staff should be grandfathered but offered the opportunity to increase their skills with additional training. Investing in staff training may also lead to improved staff retention and succession planning.

Recommendation #9: Continuously monitor community use and adjust hours of operation of each branch: Monitoring of each branch for community use of programs and services should continue, including hours of operation and accessibility considerations. This enables staffing decisions to be made to ensure that the branches respond not just to community

growth, but also changing needs and demands in each service area. Where required, staffing should be adjusted to meet demand through "change in service level" budget requests.

Recommendation #10: Adopt a "branch team" model to pair urban larger branches with the rural branches: An operational model to be considered would be to pair larger urban branches with the smaller rural ones, so that programs and services could be provided more efficiently especially to rural areas. There could also be economies of scale in terms of contracts for the Town which owns the facilities with external suppliers (e.g., facility maintenance). In effect, larger urban branches would consider the smaller rural branches to be within their service area when planning programs and services for the wider community. (Overall, this is consistent with the Town's approach to facility management in other areas.) The proposed pairing in this regard would be:

Larger Urban Branch	Proposed Associated Rural Branches
Caledon East	- Alton - Caledon Village
Southfields	- Inglewood - Margaret Dunn Valleywood
Albion Bolton	- Belfountain Lockers - Other rural services - Visiting Library Services - Interlibrary loan

Recommendation #11: Recruit to reflect the community: When recruiting new staff positions, seek individuals who are representative of the local diverse populations and can speak their languages, e.g., Punjabi, Hindi. Over time, this representativeness of the local community should extend to the Board level as well.

Recommendation #12: Continually develop the collections: As with programs and services, the collections at the CPL must continue to grow and evolve in order to meet community demand. Additions to the physical collection will of course be necessary as the number of branches grows over times. Materials in other languages, particularly Italian, Punjabi and Hindi should continue to be added. In addition to physical collections, an increased emphasis upon additions to the digital collection and virtual offerings will be required in future.

Recommendation #13: Expand marketing efforts with required staffing and other support resources: Key stakeholders, staff and the general public alike (through the community survey) expressed a desire to see expanded marketing efforts in order to create enhanced awareness and resulting use or participation. New marketing tools such as *Patron Point*[12] should be explored as ways of more effectively reaching existing patrons and onboarding new members as well as providing highly targeted messages regarding programs and

[12] See: https://www.patronpoint.com

services to specific user segments. In addition, methods of reaching out to current non-users and new residents of the community overall need to be explored, such as through active outreach campaigns that have been successful in other library systems[13]. Marketing efforts should continue to be oriented towards social media efforts, which tend to be much more effective than traditional promotional vehicles. Continual promotions and innovative ways of promoting awareness (e.g., through community events that generate free press coverage) should remain a priority. As well, the staffing and support implications of a more focussed marketing approach need to be put in place and resourced.

D) Technology

Recommendation #14: Develop a Technology Plan: Develop a three to five-year Technology Plan (roughly in synch with Stage 1 of the Growth Trajectory) that incorporates both the 'internal' and 'external' aspects of technology. Key components of this plan will include~~:~~ a security audit and system support tools; the use of additional ILS modules for operational efficiencies; and a review of ILS license options with the growth in population and system size. Staffing, training and related operating budgetary requirements need to be built into the Plan as well as well as capital and equipment costs. This plan should also recognize the Town's overall efforts in expanding fibre and wireless networks throughout the municipality and ensure that it aligns with these efforts. (Given the pace of technological change, this Technology Plan will need to be updated and revised periodically over the twenty-year timeframe of this Comprehensive Growth Plan – ideally in synch with the Stages for growth of the branches as previously outlined.)

4.2. Timing and Critical Path

The table below shows a broad-level overview of the proposed implementation plan. The first three recommendations (shown below in blue) relate to facilities and alternative service delivery, and thus follow a long-term timeline out to 2041. They map out the key stages in the development of the four-stage Comprehensive Growth Plan. Recommendations 2 and 3 show that alternative service delivery in rural areas and where physical 'bricks and mortar' branches are not yet developed will continue to be a priority.

The subsequent recommendations (shown in green) outline other non-facility related aspects of the Comprehensive Growth Plan. Here the implementation period is better thought of as aligned with the individual years of Stage 1, although as shown, many of the recommendation will stretch out continuously over the entire twenty-year period.

[13] For example, see: https://www.infotoday.com/mls/nov16/Fletcher--Reaching-the-Elusive-Library-Non-Users.shtml#:~:text=Non-users%20will%20participate%20in%20a%20survey%20if%20it's,help%20identify%20good%20places%20to%20field%20a%20survey.

Recommendation	Stage 1: to 2026			Stage 2: 2026 - 2031	Stage 3: 2032 - 2036	Stage 4: 2037 - 2041
	2023	2024	2025			
Recommendation #1: Adopt the four-stage growth plan:						
Stage 1: 2021 - 2026						
Stage 2: 2027 - 2031						
Stage 3: 2032 - 2036						
Stage 4: 2037 - 2041						
Recommendation #2: Implement self-service and open access to deliver services to branches after open hours						
Recommendation #3: Develop interim service delivery modes until new branches developed						
Recommendation #4: Develop an Alternative Service Delivery Plan for Underserviced Areas						
Recommendation #5: The development of new and innovative in-library programs and services that respond to community need should be a staffing priority						
Recommendation #6: Continually develop virtual and online programs and services, also a staffing priority:						
Recommendation #7: Adopt new streamlined organizational model						
Recommendation #8: Adopt a service model of generalist public service						
Recommendation #9: Continuously monitor community use and hours of operation of each branch:						
Recommendation #10: Adopt a “branch team” model to pair urban larger branches with the rural branches						
Recommendation #11: Recruit to reflect the community						
Recommendation #12: Continually develop the collections						
Recommendation #13: Expand marketing efforts with required staffing and other support resources:						
Recommendation #14: Develop a Technology Plan						

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

The table below summarizes at a very high level, the anticipated resourced requirements of this Comprehensive Growth Plan. These are broadly divided into human resource requirements and financial requirements.

Recommendation	Human Resources Requirements	Financial Requirements
Recommendation #1: Adopt the four-stage growth plan:		
Stage 1: 2021 – 2026	- significant staff time will be involved at all stages to work with external architects, engineers and others to locate and plan branches[14]	- Stage 1 costs estimated as: - $27.8 to 30.0 million for Mayfield West - $1.1 to $4.2 million for Alton Improvements - $1.0 to $2.9 million for Caledon Village improvements
Stage 2: 2027 - 2031		- Stage 2 costs estimated at 45.5 to $49.0 million (2027)
Stage 3: 2032 - 2036		- Stage 3 costs estimated at $33.9 million (2033)
Stage 4: 2037 - 2041		- Stage 4 costs estimated at $34.5 million (current costs)
Recommendation #2: Implement self-service and open access to deliver services to branches after open hours	- moderate to significant amount of staff time required	- will depend upon mode of alternative service selected and costs of the technology at that time - Open access $70,000 per branch - RFID self-check system $300,000 for existing 7 branches
Recommendation #3: Develop interim service delivery modes until new branches developed		
Recommendation #4: Develop an Alternative Service Delivery Plan for Underserviced Areas		
Recommendation #5: The development of new and innovative in-library programs and services that respond to community need should be a staffing priority	- likely major staffing implications to accommodate new and more programs and services to meet the needs of the growing population	- in addition to major staffing cost increases, additional programs and services will have additional materials and other cost implications, to be determined
Recommendation #6: Continually develop virtual and online programs and services, also a staffing priority:		
Recommendation #7: Adopt new streamlined organizational model	- minimal – already in progress	- funding for new Senior Leadership Position
Recommendation #8: Adopt a service model of generalist public service	- no additional staff time anticipated; training absorbed within existing training budgets	- minimal

[14] Given the extraordinary amount of design work anticipated over the next twenty years (and very likely beyond) CPL might consider hiring permanent in-house architectural expertise as an alternative to constantly working with different (and likely more expensive) external suppliers.

Recommendation #9: Continuously monitor community use and hours of operation of each branch:	- no additional staff time anticipated; training absorbed within existing training budgets	- none to minimal
Recommendation #10: Adopt a "branch team" model to pair urban larger branches with the rural branches	- To be determined (could lead to redistribution of staff resources which could have staffing and other cost implications)	
Recommendation #11: Recruit to reflect the community	- minimal	- minimal to moderate – possibly greater expenditure in the recruitment process
Recommendation #12: Continually develop the collections	- significant additional time; within existing staff time budgets (which will grow over the Plan period)	- expanded budgets will be required (expected to grow over time with expansion of the system)
Recommendation #13: Expand marketing efforts with required staffing and other support resources:		
Recommendation #14: Recommendation: Develop a Technology Plan		

4.4. Suggested Targets and Outcomes

4.4.1. General Measures of Success

As previously outlined in this Report, this Comprehensive Growth Plan is an instrument following directly out of the recently approved (2021) Strategic Plan for the CPL. As such, it should help to further the general deliverables specified in the that policy, which are outlined in the following table (along with suggested measures of success for these elements):

Indicator of Success in Achieving the Goals of the Strategic Plan	Suggested Specific Indicators
• We will see an increase in active library memberships	• percentage growth in memberships, greater than or at least equal to the growth in population
• Demand for our programs, collections and services will grow	• percentage growth in utilization, greater than or at least equal to the growth in population • absolute growth in collections, both physical and virtual
• Library spaces are modernized and able to meet expanding community need. Our branches and Makerspaces will be busy, with more visitors staying longer	• implementation of the various specific elements of this Comprehensive Growth Plan (see below) • measured increase in average length-of-stay of users in library branches (through sample surveys)
• Technologies and innovations are embraced and adopted	• development and adoption of the Technology Plan as recommended in this Comprehensive Growth Plan
• An increase in funds raised through donations, grants and sponsorship complements our budget	• increase in funds raised, as per Board approved Strategic Assessment and Evaluation Plan • possibly comparison with other library systems to determine funds raised on an per capita basis (to show parity)
• Partners value our contributions and seek out our involvement	• increase in partners with whom the library is working
• Our Board, staff and leadership teams will be more diverse and inclusive	• likely determined periodically by the Board on a judgment basis

• Our staff and customers are happy and engaged	• regular surveys of staff and user satisfaction

These eight general deliverables should be monitored and measured to determine the overall success of implementation of the Strategic Plan, of which this Comprehensive Growth Plan is a large part. This will in part demonstrate success in achieving the aims of the overall strategic plan.

Other general success measures, which will be critical to the overall implementation of the plan, will include a significant increase in the library budget and staffing (to keep pace with the anticipated growth in population and the continuing evolution and development of library services). In a sense, increased budget and staffing is both a necessary ***input to*** achieving the overall goals of both the Strategic Plan and the Comprehensive Growth Plan, as well as an ***output from*** the successful implementation of the plan, and thus a key success measure.

A final critical measure of success will be the inclusion of the facilities as recommended here within the Development Charge (DC) study will be a priority.

In addition, other suggested targets and outcomes specific to the recommendations contained within this Comprehensive Growth Plan are as follows:

4.4.2. Specific Targets for this Comprehensive Growth Plan

The table below suggests targets and outcomes that could be targeted to show progress and achievement over the period of this Comprehensive Growth Plan.

Recommendation	Suggested Targets, Milestones, Outcomes
Recommendation #1: Adopt the four-stage growth plan:	
Stage 1: 2021 – 2026	- progress underway on rural branch renovations in Alton and Caledon Village as outlined here; funding to be sought as part of the Board's 2024 budget proposal in 2024 - planning for Mayfield West complete by 2024; construction underway by 2025 - Caledon East expansion complete by 2024
Stage 2: 2027 - 2031	- new branch in place at Macville by 2031
Stage 3: 2032 – 2036	- expansion in place at Mayfield West by 2036
Stage 4: 2037 – 2041	- expansion of Albion Bolton Branch complete by 2041
Recommendation #2: Implement self-service and open access to deliver services to branches after open hours	- development of plan in 2023 (in tandem with plan for interim service delivery below); roll-out in in 2024 and on
Recommendation #3: Develop interim service delivery modes until new branches developed	- plan for interim alternative service delivery in place by 2023; funding to be sought as part of the Board's 2024 budget proposal; begin putting new services in place according to plan in 2024
Recommendation #4: Develop an Alternative Service Delivery Plan for Underserviced Areas	

Recommendation #5: Continually develop new and innovative in-library programs and services that respond to community need	- continue to develop at least one new program in each branch, each year - continue to target one new virtual or online service each year
Recommendation #6: Continually develop virtual and online programs and services	
Recommendation #7: Adopt new streamlined organizational model	- new organization structure in place by 2024
Recommendation #8: Adopt a service model of generalist public service	- new service model defined and articulated in 2023; in place by 2024
Recommendation #9: Continuously monitor community use of each branch	- ongoing; demonstrated by quarterly performance metrics and annual report on use to Library Board
Recommendation #10: Adopt a "branch team" model to pair urban larger branches with the rural branches	- branch team model approach in place in 2024
Recommendation #11: Recruit to reflect the community	- on-going annual diversity report to Library Board starting in 2023
Recommendation #12: Continually expand the collections	- on-going reporting to Library Board through monthly CEO reports and shared strategic action updates starting in 2023
Recommendation #13: Expand marketing efforts	
Recommendation #14: Recommendation: Develop a Technology Plan	

4.5. Conclusion

The Town of Caledon has a very highly regarded and well used public library system. It has an admirable track record of continually providing innovative programs and services to its users and the general community, and has followed a diligent program of improving, expanding and adding to its inventory of library facilities to enable this. And, given that Caledon is one of the fastest growing and diversifying communities in Ontario, this program of expansion and innovation must continue.

The Comprehensive Growth Plan presented here represents a seemingly challenging program of growth and development over the next twenty years. But, while this development program may seem formidable, especially when viewed 'all at once', it simply represents a continuation of CPL's demonstrated history of responding to community need through a proactive building program as well as the provision of community-responsive programs and services. CPL has demonstrated community leadership of this type repeatedly in the past. The Comprehensive Growth Plan presented here will enable the Library to continue this leadership role well into the future.

Appendix A – Open-Ended Comments from the Community Survey

*The themes identified in the tables below reflect the most common comments made in the Community Survey. Accordingly, they reflect the **perceptions** of the public, which may or may not accord with the **reality** of the situation as management and staff perceive it to be. Where the public's perceptions are accurate, they may point to actions that management and staff may choose to initiate to address a problem or provide for a need. Where the public perceptions are inaccurate, especially regarding problems or issues that they believe to exist, management and staff need to take action to communicate the present reality of the situation and inform the public of what currently exists or has recently been done.*

The following pages contain content analysis for the following open-ended questions:

- Q27: Comments on improvements to the Albion Bolton branch
- Q30: Comments on improvements to the Alton branch
- Q33: Comments on improvements to the Caledon East branch
- Q36: Comments on improvements to the Caledon Village branch
- Q39: Comments on improvements to the Inglewood branch
- Q42: Comments on improvements to the Margaret Dunn Valleywood branch
- Q45: Comments on improvements to the Southfields Village branch
- Q50: Locations for alternative service delivery options
- Q54: Suggestions for improvements to digital resources
- Q55: Suggestions for new digital resources
- Q59: Comments on improvements to programs and services at Albion-Bolton
- Q64: Comments on improvements to programs and services at Alton branch
- Q65: Suggestions for new programs and services at Alton
- Q69: Comments on improvements to programs and services at Caledon East
- Q70: Suggestion for new programs or services at Caledon East
- Q74: Comments on improvements to programs and services at Caledon Village
- Q79: Comments on improvements to programs and services at Inglewood
- Q80: Suggestions for new programs and services at Inglewood branch
- Q84: Comments on improvements to programs and services at Margaret Dunn Valleywood
- Q89: Comments on improvements to programs and services at Southfields Village branch
- Q90: Suggestions for new programs or services at Southfields Village branch
- Q99: Final Thoughts

Q27: Comments on improvements to the Albion Bolton branch

Major Themes	No. of Mentions	% of Total Comments (84)
Renovation looks good	14	17%
Suggest changes to children's section (cozier, more engaging, interactive, toys)	8	10%
Want more books (variety of areas)	7	8%
Complaint about low, dark entryway	7	8%
Haven't seen the new space, but commenting anyway	6	7%
Don't like the renovation	6	7%
Signage: larger, bigger, clearer (esp. stairs and Dewey Decimal/subject)	5	6%
Want library to be larger in general	5	6%
Larger/clearer indoor signage	4	5%
Unhappy that collection seems smaller since renovations	4	5%
Praise for friendly staff	4	5%
Request rooms for small groups/individual study	4	5%
Inadequate lighting	3	4%
More outdoor signage needed	2	2%
Lack of public transit	2	2%
Electrical outlets	2	2%
Want a café	2	2%

Q30: Comments on the Alton branch

Major Themes	No. of Mentions	% of Total Comments (32)
Not enough space	6	18%
Not enough space for meetings	4	12%
Great staff	4	12%
More programming for teens/tweens, more programming generally	3	9%
More variety of books, more audio books, more DVDs	3	9%
Makerspace	2	6%
Poor acoustics in meeting space	2	6%

Q33: Comments on the Caledon East branch

Major Themes	No. of Mentions	% of Total Comments (64)
Dissatisfaction with location in school	17	27%
Layout/atmosphere unwelcoming	8	13%
Want more programming, esp. children's and teen's (4 of 8)	8	13%
Children's space inadequate	6	9%
More materials	6	9%
Good staff	6	9%
Looking forward to new location	5	8%
Inadequate parking	4	6%
More hours	4	6%
Better signage	3	5%
Space for groups and meetings	3	5%
Want Makerspace	3	5%
Public transit needed	2	3%

Q36: Comments on the Caledon Village branch

Major Themes	No. of Mentions	% of Total Comments (37)
Complaints about access, traffic	11	30%
Want more group meeting space	7	19%
More materials, more recent materials	6	16%
More programming needed	5	14%
Better computer area	4	11%
Want quiet reading areas	4	11%
More space needed	3	8%
Friendly staff	3	8%

Q39: Comments on the Inglewood branch

Major Themes	No. of Mentions	% of Total Comments (21)
More materials, more recent materials	5	24%
More programming (adult, teen and child)	5	24%
Seating	3	14%
Friendly staff	3	14%
More hours, esp. evening	3	14%
Insistence on the importance of the library	2	10%
More space	2	10%

Q42: Comments on the Margaret Dunn Valleywood branch

Major Themes	No. of Mentions	% of Total Comments (43)
Children's programming	6	14%
More hours	6	14%
Need more space	6	14%
More materials	5	12%
Friendly staff	3	7%
More workspace, computer stations	3	7%
Needs renovation	3	7%
Teen's programming	3	7%
Concern about branch closing	3	7%
Senior's programming	2	5%

Q45: Comments on the Southfields Village branch

Major Themes	No. of Mentions	% of Total Comments (61)
Happy with new space, attractive space	10	16%
Friendly staff	7	11%
More children's programming	7	11%
More books needed	7	11%
Happy with Reading Garden	5	8%
Complaints about crowding and noise	5	8%
More space needed	5	8%
More adult programming	5	8%
More hours, weekend hours	4	7%
Complaints about parking	4	7%
Happy about proximity to the community centre	3	5%
More computer workstations	3	5%

Q50: Locations for alternative service delivery options

Major Themes	No. of Mentions	% of Total Comments (266)
Type of placement		
Outside the libraries	26	10%
Community Centres (Albion and Caledon)	23	8%
At schools	6	2%
Shopping mall/plaza	5	2%
Grocery store	5	2%
Parks	4	2%
Post office	3	1%
Type of extended/alternative service		
Extended hours: after work and weekends, focus on commuters and students	35	13%
Book mobile	18	7%
Focus on services to reach housebound seniors/residences	18	7%
Off-site Kiosks	5	2%
Home delivery	4	2%
Location		
Southfields Village	20	8%
Albion-Bolton	18	7%
Caledon East	15	6%
North Bolton, North Hill	10	4%
Margaret Dunn Valleywood	9	3%
Palgrave	8	3%
Rural Caledon	8	3%
Caledon Village	7	3%
Downtown Bolton	6	2%
Alton	5	2%
Inglewood	4	2%
Mono Mills	2	1%

Q54: Suggestions for digital resources

Major Themes	No. of Mentions	% of Total Comments (93)
Add more materials	16	17%
Did not know there were so many digital resources	14	15%
Add more copies of materials/ make waiting lists shorter	12	13%
No, it's good as is.	10	11%
More education/guidance for users	10	11%
More promotion of what's available	9	10%
No suggestions	9	10%
Improve CPL website	8	9%
Reduce number of logins required, make access process easier	6	6%
More wifi hot spots	2	2%
Longer loan times	2	2%
More computers, workstations	2	2%

Q55: Suggestions for new digital resources

Major Themes	No. of Mentions	% of Total Comments (67)
Academic resources, incl. textbooks, PubMed, JSTOR	5	7%
Newspapers, magazines	5	7%
No, it's good as it is.	3	4%
Kids' learning	3	4%
Reduce wait times, increase selection	3	4%
Foreign language learning	2	3%
More education/guidance	2	3%
Adult courses	2	3%
Interlibrary loans	2	3%
Music	2	3%
Movie/documentaries	2	3%
More wifi hotspots	2	3%

Q59: Comments on programs and services at Albion-Bolton

Major Themes	No. of Mentions	% of Total Comments ( )
More adult programming	10	23%
Programs for evenings/weekends	6	14%
More children's programming	6	14%
No, all is good.	5	11%
Better notification, marketing	4	9%
IT education	3	7%
Shelving/organization of books	3	7%

Q64: Comments on improvements to programs and services at Alton branch

Major Themes	No. of Mentions	% of Total Comments (12)
More programming for adults	4	33%
More programming for children	3	25%
Extended hours, programs for evenings, weekends	2	17%
More programming for seniors	2	17%

Q65: Suggestions for new programs and services at Alton

Major Themes	No. of Mentions	% of Total Comments (14)
Programming	6	43%
Online programming	2	14%
Additions to Library of Things	2	14%

Q69: Comments on improvements to programs and services at Caledon East

Major Themes	No. of Mentions	% of Total Comments (34)
More preschool and children's programming	10	29%
Better advertising, notifications	4	12%
More adult programming	4	12%
Programs during evenings and weekends	2	6%
More spaces in children's programs	2	6%

Q70: Suggestions for new programs or services at Caledon East

Major Themes	No. of Mentions	% of Total Comments (28)
Children's storytime or programming	6	21%
Adult programing	6	21%

Q74: Comments on improvements to programs and services at Caledon Village

Major Themes	No. of Mentions	% of Total Comments (17)
Bring back pre-pandemic clubs	2	12%
Critiques of space, accessibility	3	18%

Q75: Suggestions for new programs or services at Caledon Village

Major Themes	No. of Mentions	% of Total Comments (14)
Adult programming	4	29%
Children's programming	2	14%

Q79: Comments on improvements to programs and services at Inglewood

Major Themes	No. of Mentions	% of Total Comments (14)
Children's programming	3	21%
Adult programming	2	14%
Programming during evenings and weekends	2	14%

Q80: Suggestions for new programs and services at Inglewood branch

Major Themes	No. of Mentions	% of Total Comments (11)
Programs for children, tweens	4	36%

Q84: Comments on improvements to programs and services at Margaret Dunn Valleywood

Major Themes	No. of Mentions	% of Total Comments (17)
Children's programming	5	29%
More materials	4	24%
Better promotion, advertising	2	12%

Q85: Suggestions for new programs or services at Margaret Dunn Valleywood

Major Themes	No. of Mentions	% of Total Comments (12)
Children's programming in general	6	50%
Baby and toddler programming specifically	5	42%
IT classes: coding, social media for seniors	3	25%

Q89: Comments on improvements to programs and services at Southfields Village branch

Major Themes	No. of Mentions	% of Total Comments (25)
More children's programming	7	28%
Better advertising, notifications	4	16%
More adult programming	4	16%
More spots in programs	3	12%

Q90: Suggestions for new programs or services at Southfields Village branch

Major Themes	No. of Mentions	% of Total Comments (25)
More children's programs	7	28%
Adult programming	4	16%
Cricut machine workshops and time slots	3	12%
More programs during evenings and weekends	2	8%

Q99: Final Thoughts

Major Themes	No. of Mentions	% of Total Comments (323)
General compliments, thanks	65	20%
Compliments to staff	42	13%
Need for library as a social space, community resource	19	6%
Need for better communication, promotion	15	5%
More materials, esp. books	9	3%
Happy about renovations	8	2%
Need for more children's programming	7	2%
Improvements needed for people with disabilities	7	2%
Praise for Library of Things	5	1%
Need for extended hours, evenings and weekends	4	1%
Thanks for resources during COVID	4	1%
More programs for adults	4	1%
Re. rural/small communities being underserved	4	1%

Appendix B – Detailed Profiles of CPL PRIZM Target Segments

From the PRIZM 2020 Handbook CPL profiles include:

- Modern Suburbia
- Family Mode
- Turbo Burbs
- Kickback Country
- First Class Family

Population:
1,000,904
(2.64% of Canada)

Households:
317,626
(2.12% of Canada)

Average Household Income:
$137,614

Average Household Net Worth:
$479,204

House Tenure:
Own

Education:
University/College

Occupation:
Mixed

Cultural Diversity Index:
High

Sample Social Value:
Importance of Aesthetics

Multi-ethnic younger and middle-aged suburbanites

Who They Are

With one of the highest percentages of suburban households, Modern Suburbia is a magnet for younger and middle-aged, diverse families with young children. Many of these acculturated households contain first- and second-generation Canadians from Asia and South Asia who arrived in their 20s and 30s and have recently moved to new suburbs near large cities like Toronto, Edmonton, Calgary, Ottawa and Vancouver. More than half the population identify as visible minorities: More than twice the national average identify as Asian, and more than three times the average identify as South Asian. With their university and college educations, they earn upper-middle-class incomes from a wide range of jobs that afford them new single-family, semi-detached or row houses. And few segments are more mobile: the number of residents who have moved in the last five years is nearly 70 percent above average. Modern Suburbia members have crafted active lifestyles for their relatively large families and participate in many team sports, including basketball and hockey. For a splurge, they head to kid-friendly venues such as amusement parks, zoos and aquariums, admitting that *Attraction for Crowds* is among their strongest values.

Children are the centre of the Modern Suburbia world. Parents enroll kids in a number of sports, and vacations typically involve package deals to beaches and other family-friendly destinations; more than half travelled outside of Canada last year. A big treat is a family outing to a pizza, burger or taco restaurant. In Modern Suburbia, homes are filled with child-friendly tech products—like tablets and video gaming systems—as well as smart watches, Internet-enabled appliances and fitness bands to help manage their daily routine. Eclectic in their media tastes, these immigrant families have high rates for watching nearly every sport on TV—including cricket and rugby—and reading varied magazines on parenting, technology, business and health. But mostly these connected families like to use their mobile phones to access media and perform various tasks, like banking, streaming music, posting to social networks and downloading coupons; they buy almost every retail category online at high rates. Stating they like to be the first to own new technology, they're receptive to many forms of mobile advertising, including coupons based on their demographics.

How They Think

The immigrant families of Modern Suburbia are comfortable in their adopted country and feel optimistic about their future (*Personal Optimism*). They've demonstrated their *Penchant for Risk* in their decision to uproot their family, and they fervently believe that anyone can make it if they work hard enough (*North American Dream*). While these younger families sometimes feel overwhelmed (*Time Stress*), they accept both the good and the bad outcomes of the decisions they've made (*Just Deserts*). They support diverse communities and their desire to preserve their distinctive cultures (*Multiculturalism*), and they seek to incorporate those cultural influences in their lives (*Culture Sampling*). In their neighbourhoods, they demonstrate their social status through their well-maintained homes decorated with objects that convey affluence (*Status via Home*, *Ostentatious Consumption*). They're eager to discover new products and integrate them into their daily life, but they're also drawn to items simply for their aesthetics rather than their functionality (*Pursuit of Novelty*, *Importance of Aesthetics*). These consumers especially like to make purchases in their areas of interest (*Consumptivity*), if only to exercise their role as influencer among their peer group (*Consumption Evangelism*).

Population:
1,034,278
(2.72% of Canada)

Households:
337,797
(2.26% of Canada)

Average Household Income:
$141,436

Average Household Net Worth:
$572,677

House Tenure:
Own

Education:
College/High School

Occupation:
Mixed

Cultural Diversity Index:
Low

Sample Social Value:
Need for Escape

Suburban, upscale middle-aged families

Who They Are

Comprising more than a million people, Family Mode is one of the largest segments—and growing. Home to large, suburban families living in recently built houses, this lifestyle is rooted in midsize cities surrounding large metro areas. Its neighbourhoods are filled with maintainers between 35 and 54, and children over the age of 10. These middle-aged adults have used their mostly high school and college educations to land a variety of decent-paying jobs—from blue-collar to management level—in industries like retail, public administration, education and health. Thanks to dual-income households, their upper-middle incomes allow them to purchase single-detached houses valued at nearly $450,000—close to the national average. As in other suburban family segments, sports are central to the Family Mode lifestyle, with many garages filled with skiing, golfing and hockey equipment as well as motorcycles, boats and camping trailers. Family Mode members make an *Effort Toward Health*, often working out at fitness clubs and enrolling their kids in soccer, swimming and ice skating clubs.

The members of Family Mode straddle two worlds: close enough to downtown for their work but far enough away to enjoy outdoorsy activities. These families like golfing, gardening, canoeing and power boating. Many residents belong to sports teams and spend their weekends playing basketball, baseball and volleyball. Their idea of a vacation is to pack up the RV or camper and hit the road to one of Canada's parks, relax at a beach or ski resort, or take a cruise. The adults are both financially savvy and philanthropic, supporting various charitable organizations. Many appear too busy for a lot of media. They're only average consumers of traditional media, enjoying the HGTV and Food Network channels on TV, new and traditional country music on the radio, and magazines like *Today's Parent* and *Style at Home*. And digital media for them is all about shopping, especially for books, groceries, travel deals and theatre tickets. A tough market for advertisers, Family Mode residents have modest rates for responding to direct mail, and they barely notice out-of-home messages or digital screens except on their commutes.

How They Think

Family Mode residents have worked hard to achieve their upscale status, and they're sticking with the straightforward principles that got them there. They're content to live with a certain amount of chaos in their lives and have an optimistic view of the future (*Rejection of Orderliness*, *Personal Optimism*). These mostly third-generation Canadians are open to diversity, even within their own families, and think that interacting with people from different backgrounds enriches their lives while satisfying their interest in exploration and discovery (*Racial Fusion*, *Social Learning*). They're more likely to define families based on the emotional commitment between people rather than any legal formalities (*Flexible Families*). Many have a strong sense of *Duty*, putting their obligations to others ahead of their personal interests and striving to leave a *Legacy* behind for future generations. Occasionally, those impulses leave them weary and yearning to find relief from the stresses of daily life (*Need for Escape*). Strong on *Concern for Appearance*, they are image driven and like to demonstrate their individuality with personal touches and unique flourishes (*Pursuit of Originality*).

Middle-aged upscale suburbanites

Population:
489,718
(1.29% of Canada)

Households:
162,533
(1.09% of Canada)

Average Household Income:
$212,649

Average Household Net Worth:
$1,483,649

House Tenure:
Own

Education:
University/College/ High School

Occupation:
White Collar/Service Sector

Cultural Diversity Index:
Low

Sample Social Value:
Personal Challenge

Who They Are

The wealthiest suburban segment, Turbo Burbs is a haven for middle-aged families enjoying the fruits of their labour. Found in the outer-ring subdivisions of a handful of large cities, the segment mostly contains families with children between the ages of 10 and 25. More than 90 percent of households live in recently built single-detached homes, with an average dwelling value of more than $700,000. The adults have parlayed mixed educations—with significant rates for high school, college and university achievement—into well-paying management, finance, education and government jobs. In their suburban neighbourhoods, many spend a lot of time in their cars, relying on their vehicles to commute to work and chauffeur their teenage children to after-school and athletic activities. While these families live well, participating in all kinds of outdoor sports and travelling extensively, they also give back to the community, volunteering their time and scoring high for donating more than $5,000 a year to charities. Members of Turbo Burbs believe they have a *Social Responsibility* to help those less fortunate.

Turbo Burbs presents a portrait of suburban success. These home-centric families spend freely on technology, home décor, gardens and decks; they equip their properties with hot tubs, gas barbecues and patio furniture. But these adults work for it and travel for business at high rates. And while medium-size luxury cars and large SUVs dominate their garages, there's also room in there for boats, camping equipment and lots of exercise and golfing gear. The adults here enjoy going out to bars and restaurants: they're frequent patrons of sports bars, pubs and nearly every casual family restaurant chain in Canada. A weekend date may mean a trip to the theatre, a dramatic movie, country music concert or museum. For a longer vacation, Turbo Burbs families like to explore English Canada, cottage country or almost any state in the U.S. They're not fussy about accommodations and have high rates for staying at all-inclusive resorts, bed and breakfasts, RVs and campgrounds. They can enjoy their on-the-go lifestyle thanks to a financial cushion: a large, diversified portfolio with a high net worth.

How They Think

Turbo Burbs residents have been successful in establishing their place in society, as their affluence and lifestyle suggest. They're comfortable setting difficult goals for themselves, controlling the direction of their lives and questioning authority figures (*Personal Challenge*, *Personal Control*, *Rejection of Authority*). They see Canada as a land of opportunity where anyone who works hard enough can make it (*North American Dream*). Turbo Burbs members hold progressive values, accepting non-traditional definitions of family and giving their children the freedoms of adults (*Flexible Families*, *Equal Relationship with Youth*). As consumers, many think of themselves as leaders and influencers among their peers (*Consumption Evangelism*), and they prefer products offered by companies that are good corporate citizens (*Ethical Consumerism*). Indeed, they support small businesses because they believe they operate more ethically and produce goods at a better price compared to large companies (*Confidence in Small Business*). They have their favourite brands and are especially drawn to items that demonstrate their individuality (*Importance of Brand*, *Pursuit of Originality*). Despite all these decision criteria, price is still important to them, reflecting their tendency to be guided by reason and logic (*Importance of Price*, *Emotional Control*).

Population:
517,828
(1.36% of Canada)

Households:
182,926
(1.22% of Canada)

Average Household Income:
$145,714

Average Household Net Worth:
$935,079

House Tenure:
Own

Education:
Mixed

Occupation:
Blue Collar

Cultural Diversity Index:
Low

Sample Social Value:
National Pride

Rural, middle-aged upscale families and couples

Who They Are

The wealthiest rural lifestyle, Kick-Back Country is a collection of middle-aged families and older couples living in rustic areas near large and medium-size cities. For some, their communities are a weekend getaway from their busy life in the city. The maintainers tend to be between 45 and 64 years old, and children range in age from 5 to 24. Despite mixed educations—mostly high school, college and university—residents earn impressive incomes averaging more than $145,000 from well-paying jobs in management as well as mining, construction, trades and transportation. The lower cost of living in their rural areas means nearly nine out of ten households own a home. Many are second- and third-generation Canadians drawn to spacious, single-family houses built beyond the urban sprawl; the average dwelling value is nearly $600,000—35 percent above average. Their driveways often contain domestic compact SUVs and large pickups for commuting to work, hauling camping and boating equipment and travelling to the city for shopping. With their conservative social views, these households score high for the value *Traditional Families*.

The middle-aged households of Kick-Back Country like their new country lifestyle with their gardens and pets and plenty of fishing and hunting gear to make the most of their rural landscapes. They typically do their own maintenance and spend weekends prowling the aisles of Lowe's, Home Depot and Home Hardware. They're not too remote for big-city nightlife, but they also enjoy going to relatively closer dinner theatres, rock concerts and casinos. And they try to keep up with trends by frequenting exhibitions, particularly craft, home and garden shows. With their solid incomes, they have the means to travel, enjoying cruises and beach resort packages. While not overly enthusiastic about technology, they've embraced tablets and download an array of apps—from banking and weather reports to music and games. But traditional media maintain a hold on Kick-Back Country adults, and when their chores are done, they sink into their easy chairs to watch TV sports, listen to radio stations playing new and traditional country, and read food and gardening magazines. Many subscribe to community newspapers, if only for the flyer inserts.

How They Think

The members of Kick-Back Country appreciate values passed down through generations to help them organize their lives (*Personal Control*). They place great importance on their faith, insist that the father be the head of the house and think people must work hard if they want to get ahead (*Religiosity*, *Patriarchy*, *Work Ethic*). In their homogeneous communities, they worry that immigration threatens the purity of the country and believe newcomers should give up their cultural identities (*Xenophobia*, *Cultural Assimilation*). Many prefer the formal over the casual, dressing and behaving in a respectful manner (*Propriety*) and taking pains to ensure they project an attractive image (*Concern for Appearance*). Despite substantial nest eggs, they have *Financial Concern Regarding the Future*. But this does not stop them from enjoying the sheer act of buying things (*Joy of Consumption*) and selecting items for their aesthetics rather than their utility (*Importance of Aesthetics*). They prefer patronizing small businesses, which they believe are more fair and ethical than large corporations (*Confidence in Small Business*). Like other rural groups, they enjoy being close to the natural world (*Attraction to Nature*) as part of their healthy lifestyle (*Effort Toward Health*).

Large, well-off suburban families

Who They Are

An upscale suburban lifestyle, First-Class Families is characterized by sprawling families—more than 40 percent of households contain four or more people—living in close-in suburbs. More than half the households are located in established neighbourhoods in Toronto, Calgary, Ottawa and Vancouver. In First-Class Families, the parents are middle-aged, the children are over 10 and nearly 90 percent of households live in pricey, single-family houses. With their solid educations, the adults hold white-collar jobs in management, education and government, and earn incomes that are nearly twice the national average. One quarter of households contain second-generation Canadians; the segment scores high for members for whom Italian, Polish, Greek or Mandarin is their mother tongue. These families enjoy many team sports—baseball, basketball, football, hockey, volleyball—as both participants and spectators. And many families look forward to weekends when they can shop, go out to eat or relax with their tablet to watch Netflix or indulge in e-commerce. Committed to living a healthy and wholesome lifestyle, this group scores high for the value *Effort Toward Health*.

First-Class Families households enjoy the trappings of success. They have the nice house in the suburbs complete with hot tub, home theatre system, landscaped garden and garage filled with boating, golfing and snowboarding equipment. They drive high-end cars equipped with streaming audio and typically own three or more vehicles. The parents spend a lot of their free time chauffeuring their teenage children to athletic activities and stores like Sport Chek and Lululemon Athletica as well as The Gap, Eddie Bauer, Roots and Old Navy. A big splurge in First-Class Families involves a trip to a theme park, waterpark or indoor amusement centre. And everyone relies on tech devices to keep up with their busy schedules—from smartphones and smart watches to voice-activated smart speakers. These time-crunched families routinely skip home-cooked dinners to patronize fast casual restaurants and pizza chains. And as interest in traditional media declines, residents here go online using mobile phones and tablets for a range of activities—from accessing professional sports content and listening to a radio broadcast to researching products and visiting social media sites. Among their favorites: LinkedIn, Twitter, Instagram and Reddit.

How They Think

Members of First-Class Families have a desire to preserve their traditions but they expect new immigrants to adopt the mainstream culture (*Search for Roots*, *Cultural Assimilation*). With a strong *Work Ethic*, they believe children should be taught to respect others and work hard to get ahead, but they also think young people should have the same freedoms as adults (*Equal Relationship with Youth*). With their *Emotional Control*, they make decisions based on reason and logic rather than feelings and intuition, which helps them accept the uncertainties of modern life (*Adaptability to Complexity*) and exert *Personal Control* over the direction of their future. They refrain from judging others, preferring not to take sides (*Introspection & Empathy*). But they're passionate about protecting the environment and think everyone has a role to play in the effort (*Ecological Concern*). And despite their affluence and creature comforts, it's still important for them to look good (*Concern for Appearance*). As consumers, they have a tendency to shop impulsively, and they're happy to pay a premium for their favourite brands (*Buying on Impulse*, *Importance of Brand*).

Population:
757,060
(1.99% of Canada)

Households:
232,200
(1.55% of Canada)

Average Household Income:
$186,272

Average Household Net Worth:
$1,227,636

House Tenure:
Own

Education:
University/College/ High School

Occupation:
White Collar/Service Sector

Cultural Diversity Index:
Low

Sample Social Value:
Concern for Appearance

Attachment 11-A

CALEDON PUBLIC LIBRARY BOARD: ANNUAL AGENDA/WORK PLAN 2023

Month	Governance/Strategic Issues (activities in order to fulfill accountability obligations | policy development, review and revision, financial oversight, connections with council and community, monitoring and evaluation, committee work e.g. CEO appraisal, facility planning recruitment)	Information Needed (reports and monitoring documents and additional information required to support discussion of and action on strategic issues)	Board Action (proposed action as a result of governance and/or strategic issues and discussions)
January	• Review of 2022 Strategic Actions Completed • Review of 2022 Q4 and Annual Statistics • Comprehensive Growth Plan Review	• Q4 and Year End Statistics Report • 2022 Strategic Action Update • 2022 Procurement Update • 2022 Donation Reserves Update • Drafted Growth Plan	• OLA Boot Camp Registration
February	• No meeting – CEO to contact all new Board members for one-on-one meetings and library tour	• Board info binders to be provided	
March	• Anticipated first meeting of new term • Board orientation – Session 1 of 4 • Schedule of Board Meetings – 2023	• OLA Conference Feedback • Drafted meeting schedule	• Nomination and selection of Chair • Year End Variance Review – 2022 • Meeting evaluation
April	• Board orientation – Session 2 of 4 • Review of Quarterly Statistics – Q1 • Review of Annual Report 2022 • Strategic Assessment and Evaluation Report • Advocacy Policy Review • Staff Engagement Results	• 2023 Q1 Statistics Report • Drafted policies and reports • Financials • Annual Report • Staff Survey Analysis	• Nomination and selection of executive and committee members • Master Plan presentation to Council
May	• Board orientation – Session 3 of 4 • Bed Bug Policy Review • Comprehensive Growth Plan Review – Final	• Drafted policy • Final Growth Plan	• Meeting of CEO Assessment Committee
June	• Board orientation – Session 4 of 4 • Social Media Policy Review • CEO Annual Performance Evaluation	• Drafted policy • Mid-year procurement update • Mid-year donation reserves update	• Meeting of Advocacy/Fundraising Committee • Meeting evaluation

		• CEO to provide goals for coming term – July 2023 to June 2024	
July	• No meeting		
August	• Initial budget consideration • Review of quarterly statistics – Q2	• 2023 Q2 Statistics Report • Draft 2024 budget	• Finance committee meeting to review draft budget • Variance Review – Q2 2023
September	• Staff IT Acceptable Use Policy • Indigenous Respect and Acknowledgement Policy Review • Adjusted budget review	• Staff report • Revised 2024 budget	• Meeting of Advocacy/Fundraising Committee
October	• Review of quarterly statistics – Q3 • Partnership Policy Review	• Drafted policy • 2023 Q3 Statistics Report	• Variance Review – Q3 2023 • Meeting evaluation
November	• Annual Board Assessment • Records Management and Retention Policy Review • Call for interest in OLA Board Attendance • Schedule of Board Meetings - 2024	• Assessment criteria and questions • Drafted policy • Staff reports	• Completion of Assessment Questionnaire
December	• OLA Board Attendance Confirmation • Internet and Technology Acceptable Use Policy • Inclement Weather and Unscheduled Closure Policy	• Board Assessment Results • Staff reports	• OLA Conference Registration • Meeting of Advocacy/Fundraising Committee
January 2024	• Review of 2023 Strategic Actions Completed • Review of 2023 Q4 and Annual Statistics • Review of Operational Policy • Review of Privacy Policy	• 2023 Q4 and Year End Statistics Report • 2023 Strategic Scoresheet • 2023 Procurement Update • Drafted Policies	• OLA Super Conference/ OLBA Boot Camp attendance