

APPENDIX III
TRENDS AND LIBRARY PLANNING DOCUMENT REVIEW

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.1 Trends

A number of documents have been identified as being a source of information to the Central Library Needs Assessment Study on needs, trends, utilization and so forth. The following documents were reviewed to source some of the trends:

Ontario Public Libraries Strategic Plan – June 2000

The trends and challenges identified from these reports are significant and broad. Also, they document that there is no specific outcome or conclusion to some of the trends and impacts, rather variable points of view at this juncture. The following are some of the key considerations:

Demographics

The data analysis, both in this report and on a broader Ontario basis, indicates several key demographic considerations:

- An aging population, as the boomers currently 37 to 52 years of age, move towards retirement. Currently, many of the boomers are moving into empty nest environments which is changing their priorities from education for their children and family recreation to health care, personal hobbies and development, travel and other pursuits.
- Increased multi-cultural development of the population as immigration continues to play a major part within the population growth factors, much of the immigration now being sourced from non-traditional sources. These new Canadians will have had much different experiences with libraries, many of them never having had access to such resources. As a result, language, cultural sensitivity, creating inviting and open environments for their use and understanding their needs will become increasingly important considerations in the delivery of public library services.
- User expectations of all public services is becoming increasingly business-like with more emphasis on immediate service access, enhanced customer service and other similar expectations. The demand expectations of the consumer are increasing.
- The evolving of three distinct information and technology-based population groupings are identified. A group of young people who are highly computer capable and view the computer as an extension of

their regular life and skill sets. In the middle adult age frames that group understands computers, can use them but does not have the depth of understanding and application on a day to day basis like the younger generation. An older generation, who have limited experience with computers and technology, though many are trying to learn about and to use computers. Many are challenged and are not connected .

An aging profile, multi-cultural development and consumer expectations are clearly major trends in the future related to public services within community libraries. Also, the evolving differences in technology understanding and utilization amongst the population is creating an increasing technology-based market segmentation profile within the population.

Technology

Technology has become a major source of investment and operations for public libraries. The role of the library with respect to technology, information services, technology access, service generation and services is being played out at variable levels amongst libraries. Some view libraries as an electronic access vehicle to existing databases. Others view libraries as having the capability to generate the databases and make them available. What is universally accepted, is that libraries represent a service opportunity for people who do not have access to computers, or who require support for accessing data. What is less certain, is the library's role in generating databases and information platforms. Beyond the information component of technology, are many considerations related to E-books, E-publishing, digital text, multi-media information sources and uses, access to computer equipment and other technologies. These forms of technology are capable of significantly repositioning public libraries related to the services they offer, how users and the community view libraries and the types of investments necessary in human resources, hardware, software, facilities and so forth required to deliver these services.

In terms of trends, the intensification of the technology component of libraries is a given. The question that emerges is what is the level of service, role of the library and investment requirements to support a public library in meeting the community's expectations and needs. One of the key considerations that emerges from this point, is that more and more people may be accessing libraries not from a branch but from home, school, work, community centres or other sites which could impact the public services component of the library by intensifying the need for technology resources to meet volume needs.

Education

Many of these have been repositioned as resource centres with significant technology applications. However, some school boards have reduced the Librarian component of their resource centres which could result in some changes are occurring within the elementary and secondary that could impact involving an increased need for public libraries to support students in accessing information for their reports, curriculum needs, home schooling requirements and other related activities. Libraries have fulfilled some of these roles over time but have not been necessarily focused on curriculum support. There could be some demands in the future for more integration between public libraries and educational service providers marrying up these resources.

Also, with the significant curriculum change that is occurring, public libraries may need to ensure that their materials are consistent and supportive to the new curriculum features and not the features that are no longer of importance or taught within the school system.

Other educational considerations are the increasing presence of home schooling, private schools and other forms of educational service delivery. Also, there has been some movement towards private vocational schools and potentially in the future, private colleges and universities. Some universities are now offering online courses and curriculum. Intensification of these types of ‘satellite’ operations could result in the public libraries playing a more significant role in supporting students who do not attend the traditional campus-like educational facility with its own in-house library.

Operating Environment Restructuring

The operating environment for public services that involves libraries is changing. Fiscal constraint, the changing roles of government, identification of partnership based service delivery, multi-use facility development strategies, increased expectations to capture additional revenue sources and increased emphasis on accountability and outcome measurement are all well identified across the spectrum. These are not impacts just for libraries, but effect child welfare, children’s mental health, leisure services, health care, education and all the publicly supported service sectors.

Economic Restructuring

Fundamental restructuring of the economic base of the country is underway. Globalization represents a vision that is changing people’s expectations in terms of the types of information they need, expect and want to access. World travel is becoming increasingly popular and available, corporations work on a

much broader global scale and the overall perspective of individuals is increasingly globally due to television, breaking news stations and other communication and information resources. Additionally, self-employment, growth in small businesses, along with home-based businesses, often creates demand within these sectors for information resources to support marketing, product development, sales, production and after tasks. Libraries are often cited as potential vehicles for these information needs as many of these users have limited budgets and / or do not have the ability to access permanent databases online or via printed materials.

Another key consideration is that training and the retraining of staff and individuals is an increasing phenomenon in order for people to stay relevant, employable and self-sufficient. Also, the need for resource materials for training and ongoing retraining is a growth industry and libraries may have a role in providing materials and opportunities for people to continually upgrade themselves in terms of their general learning, specific technical knowledge and skills development.

Market Environment

The market environment for library services is changing. The introduction of large book stores such as Chapters and Indigo, online books as recently developed by Stephen King and other strategies are changing how people access materials, whether for leisure reading or reference applications.

Some of these facilities are positioned to be more user / customer focused with substantial amenities and connections with other services. Others are as simple as online access and the printing out of materials in home environments. Though all this market restructuring can be exciting and is happening, the long term stability of these trends is not yet established. What becomes increasingly important for public libraries, is to know who their customers are, what segments and niches they serve and not to try to be what others are but to be what the public needs libraries to be.

Summary

Many of the trends could indicate less facility space may be required as more and more of the library's services are accessed online. However, libraries are a meeting place, a depository for unique resources and collections, a program site and a technology centre. These primary roles will continue to grow. The written book will not disappear. It will continue to play a substantive role in people's lives whether for leisure reading, reference, business, how to fix something and other topics. Therefore, public libraries will be evolving on the basis of their current foundation as well as on the new technology foundation. This new foundation is not necessarily going to reduce space requirements but in fact may be opening up

entirely new areas of service beyond what libraries have experienced in terms of user levels, community expectations and service delivery strategies.

Burlington Library Environmental Scan

In February 2000, Marilyn Powell, Special Projects Librarian prepared an environmental scan for the Burlington Public Library. She identified the following key trends:

- General trends related to moving towards fundraising, advocacy, training, amalgamation of library boards, collaboration with other institutions and municipalities on web pages and increased Internet connectivity.
- Increased use of partnerships with government, business and industry, along with non-profit organizations.
- Increased emphasis on documenting and measuring the social and economic benefits of the library to the community.
- The introduction of library café, café bars and other key amenities, , along with increased emphasis on a customer focus as articulated in experiences at the Mississauga Public Library, Kitchener Public Library and other areas.
- Introduction of selected innovative features, such as drop-off windows, Internet tutorials for English as a Second Language students and other services.
- Book donation programs for tax receipts, virtual book stores and other similar initiatives.

This report cites a lot of infield experience, and also addresses aging, health concerns, computer literacy and many other demographic and other trends as earlier identified.

Burlington Public Library Community Consultation Program – January 1997

In January 1997, the Burlington Public Library completed a community consultation program based on household survey and a library user survey.

The following points are some of the key result summaries.

- Borrowing books, placing holds, inter-library loans, seating, study space and information related videos were all popular services of high value.

- Increasingly important services involved compact discs, videocassettes for children, feature films and Internet access for recreational purposes.
- Fundraising was seen as a funding option in both surveys.
- Burlington residents indicated a preference for free basic library services. Increased hours of operations were strongly preferred.

The survey results articulated some of the preferred areas of service that would impact floor space areas, such as areas for studying, reading, audiocassettes, etc. It also indicated the importance and preference for a core services strategy within the Library.

Burlington Public Library Services Needs Study

In September 1991, the Library completed, through a consulting firm, a Needs Study. This study identified issues related with the operational dimensions of the Central Library in terms of customer service, parking, working spaces and several other considerations. It also identified system considerations related to the need for a stronger planning focus primarily due to the rapid population expansion of the community.

Also noted, were furniture and equipment concerns in the children's area, occupancy loads of the Central Library, lack of staff work areas and customer service and convenience issues related to washrooms and other facility support needs.

Overall, the study developed a basis for considering some longer term planning considerations. Much of the input is consistent with the findings of the current planning initiative and input sessions.

Burlington Central Library Functional Audit and Feasibility Study

Peter Hossack Architect Inc., completed this audit in September 1999. The following are the highlighted Executive Summary points.

- Identified significant functional deficiencies were:
 - o A lack of parking and poor traffic flow
 - o Poor exterior accessibility
 - o A lack of washroom facilities

- o Poor interior accessibility and circulation patterns
- o Crowding of the collections
- o Crowding of staff and public areas
- o Extreme congestion at the main entry and check-out desk
- The three priority items to be addressed were identified as:
 - o Provide washrooms to the main floor
 - o Provide a barrier free access to the building
 - o Provide a 24 hour book drop away from the main entrance
- An assessment that any immediate resolution on interior functional deficiencies without a building expansion taking place is very difficult, primarily due to the insufficient existing space. Significant improvements cannot be made without building expansion.
- Four building addition options, involving 15,000 sq. ft. each were provided with the recommended expansion proposal being to the south and west areas of the present building which would also add a new parking area to the south of the current facility.
- Expansion to the south was also seen as enhancing the community presence / visibility of the library.
- The expansion cost estimates ranged from \$2.3 million to approximately \$2.7 million.