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To: Toronto Public Library Board – April 4, 2005
From: City Librarian
Subject: **Planning Framework for Toronto Public Library's Capital Program for Library Branches**

Purpose:

To outline the planning framework for developing the Library's five-year capital program and recommend a process for assessing new capital requests outside the program.

Funding Implications and Impact Statement:

There are no funding implications resulting from this report.

Recommendation:

It is recommended that the Toronto Public Library Board:

- (1) receive the *Planning Framework for Toronto Public Library's Capital Program for Library Branches* for information; and
- (2) approve the process for assessing new proposals or changes to existing projects for the capital program.

Background:

Toronto Public Library has a planning framework to guide the development of its capital program for Library branches. In 2003, Council approved an annual City-funded \$10 million net capital envelope based on funding benchmarks to maintain the Library's buildings in a state-of-good-repair. Since then, the \$10 million net capital envelope has been stretched to accommodate new buildings, relocations, and expansions resulting from service growth and growing information technology requirements. Periodically, however, it is necessary for the Library to consider proposals for branch relocations, expansions, or new branches that are not part of the Library's five-year capital program. This review may be in response to requests from the City, stakeholders or members of the public, opportunities that arise, or unforeseen circumstances to which the Library must respond.

At its December 2004 meeting, the Library Board requested staff to develop guidelines to assist the Board in evaluating requests for new capital projects. This report outlines a process to assess new requests for the capital program in a three-step approach that includes:

- ♦ evaluating requests in terms of established planning criteria;
- ♦ evaluating a request against a number of factors; and
- ♦ identifying the impact on current priorities.

Comments:

Toronto Public Library strives to provide accessible library service throughout the city. In order to meet this goal, the Library has established a planning framework, which includes broad strategic directions and planning guidelines highlighted in the Service Delivery Model and the Joint Facilities Policy. This framework is used to evaluate opportunities to improve library service to residents and develop the capital program.

Strategic Directions

The Library's established annual \$10 million net City-funded envelope must finance state-of-good-repair projects, larger renovations, and relocations, as well as new facilities. However, the funding envelope is essentially only sufficient to address state-of-good-repair and renovation projects with very little available to address service growth, enhancements or information technology requirements.

In June 2004, the Library Board received the *Service Harmonization Update* report, and approved the recommendations therein with respect to branch development. The report recommends endorsing a branch development strategy of maintaining existing branches by enhancing services and facilities at existing locations, and planning for additional branches only in the Scarborough City Centre and Waterfront areas.

The residents of Toronto ardently support Library branches across the city, and there is a strong desire to maintain these branches. With a network of 99 branch locations across the city, Toronto Public Library has more branches than any other public library system in North America. However, the average building is 34 years old, and more than half of the branches are over 30 years old. The focus of the report's recommendation is to contain branch growth and maximize the use of existing branch infrastructure since few locations across the city meet the established population and distance criteria for a new branch. Building within the funding envelope comes at the expense of the state-of-good-repair program for existing facilities. The branch planning framework will allow the Library to enhance collections and hours at existing locations, and ensure that branch buildings are well maintained and responsive to local communities.

The Scarborough City Centre and Waterfront areas have experienced significant population increases and were pre-amalgamation capital projects from the former Scarborough and Toronto library systems. Further requests for new branches will place additional pressures on the capital budget and challenge the Library's ability to provide effective services.

In June 2004, the Library Board also approved *Urban Stories: The Next Chapter - Toronto Public Library's Strategic Plan 2004-2007*, and directed staff to integrate the strategic plan into the Library's future annual plans including operating and capital budgets. There are four key priority areas outlined in the strategic plan: Books and Culture, Low Income Neighbourhoods, Newcomers, and Youth. These priority areas complement and contribute to City initiatives and will be the Library's focus for the next four years.

Specifically, Low Income Neighbourhoods have higher incidences of individuals and families with low income. The Library is well positioned to address some of the issues of concern in low income neighbourhoods by enhancing services at certain branch locations, and ensuring that these branches are well maintained vis-à-vis the capital state-of-good-repair program and through renovations.

Undersized or inadequate branch facilities in these priority neighbourhoods are incorporated into capital planning for renovation and possible expansion in relation to other facility enhancements planned for the neighbourhood and as opportunities arise. Access to extended services such as quiet study space, computers, job search classes, community meeting space, and expanded collections are all important in meeting the needs of low-income neighbourhoods.

The Service Delivery Model

The Service Delivery Model was developed in the early stages of amalgamation. It ensures equitable access to library services across the city and a rational approach to resource allocation. The Service Delivery Model established four tiers of library service and includes population and distance guidelines as indicators of need for service for the two more prevalent tiers - neighbourhood and district branches.

Neighbourhood branches serve a minimum of 25,000 residents living in a 1.6 kilometre radius, and district branches serve a minimum of 100,000 residents living in a 2.5 kilometre radius. These key guidelines are the first lens in which potential new branches are considered. If a new facility is warranted, preferred site location criteria such as location at a major intersection, proximity to public transit, proximity to community focal point and joint facilities, have been developed and are an integral part of the planning process.

The Service Delivery Model specifies optimal facility sizes for branch libraries. Neighbourhood branches should be a minimum of 7,000 square feet and district branches a minimum of 25,000 square feet. New branch facilities are built to these size guidelines. Expansion of existing undersized branch facilities is also a priority and opportunities are reviewed and incorporated into the capital program as appropriate. The recent Malvern District Branch expansion from 15,000 to 25,000 square feet is a good example of this. These projects are balanced to upgrade facilities throughout the City at both the district and neighbourhood level.

Joint Facilities Policy

In April 2003, the Library Board approved the Joint Facilities and Joint-Use Facilities Policy. Joint facilities provide enhanced service to the public through the synergy that is created through partnerships. There are many advantages in terms of user convenience, efficiencies, cost savings and opportunities for desirable locations that otherwise would be unattainable. The Library supports facilities that are efficient and effectively managed. Sharing construction costs, physical facilities and ongoing maintenance reduce capital and operating expenditures.

Numerous Toronto Public Library branches presently occupy leased spaces. City Council has expressed its desire for the Library to relocate its branches from leased facilities onto City-owned land whenever feasible. Joint facilities provide the opportunity to locate branches onto owned sites that enhance library service and avoid costs for land acquisition that may be otherwise prohibitive.

Guidelines, which detail the criteria and conditions that contribute to a successful joint facility, provide a context and framework to evaluate opportunities for new or relocated facilities.

Development of the Capital Program

The Library's capital planning is informed by the planning framework outlined above. The capital program reflects priorities that balance a number of factors, however, state-of-good-repair projects remain the Library's key priority given the size of the existing funding envelope. The factors weighed in determining priorities include:

- the need to maintain all Library branches in a state-of-good-repair and address urgent needs repair (Dawes Road, Runnymede, S. Walter Stewart), relocation out of leased facilities (Morningside, Jane Sheppard) and opportunities for improved locations or joint facilities (McGregor Park);
- service delivery issues such as the expansion of branches to meet the space requirements needed to provide a full range of services, the enhancement of district libraries (Maria Shchuka, Malvern, Bloor Gladstone), enhancing library service in high needs areas of the city (St. James Town), and balancing local needs while providing equitable service to all parts of the city;
- budgeting issues such as prioritizing projects within an established funding envelope, and synchronizing plans with the city or other agencies that can impact the progress of joint facilities.

The Library has a Council-approved \$10 million net capital program to maintain the Library's buildings in a state-of-good-repair, which is used to develop its five-year capital program. The capital costs of new branches range from \$3 million for a neighborhood branch of approximately 7,000 square feet to \$8.5 million for a district branch of approximately 25,000 square feet. Capital projects that expand existing infrastructure have a notable impact on the Library's

operating budget. The annual operating costs for new branches range from approximately \$500,000 to \$1.5 million depending on open hours and staff requirements.

New/Changed Proposals for Consideration in the Capital Program

Periodically, it is necessary for the Library to consider proposals for branch relocations, renovations, and new branches that are not part of the Library's five-year capital program. Alternatively, a project may already be included in the capital program, but the request is to advance the timelines of the specific project within the program.

New projects outside the approved capital program result in a reallocation of resources within the funding envelope unless new funding sources are identified. Any reallocation of resources may create difficulties or other ramifications inherent in changing priorities and as such, cannot be made lightly.

The Library has developed a rigorous and comprehensive planning framework, and as the first step, all new proposals should undergo the same evaluation process in which existing approved projects were examined. New proposals should advance or preserve the integrity of the Service Delivery Model and be evaluated against the following criteria:

- minimum population thresholds and distance criteria for branch service areas and to other branches;
- minimum facility size requirements and preferred site and location criteria;
- appropriate usage and performance levels (for existing branches);
- facility condition and renovation history (for existing branches).

If a proposal meets those planning conditions, then the opportunity that each proposal presents is evaluated in terms of the following factors:

- strategic priority - how does the proposal advance the Library's strategic priorities?
- unique site/location - does the proposal present the Library with an opportunity to obtain a desirable site that may not be available again?
- partnerships - does the proposal present the opportunity to enter into a joint facility or other type of partnership arrangement which is beneficial and which must be acted upon in the short term?
- alternative funding available - does the proposal provide access to funding which is outside the existing capital envelope?
- fiscal responsibility & sustainability - will the proposal allow the Library to realize sustainable operating cost savings or can it be sustained within the existing budget?

As a third step, new proposals must be evaluated in terms of the impact of changing current priorities. Shifting priority from other approved projects has a potential impact on existing service delivery, neighbourhood vitality, partnership opportunities, the condition of current facilities, and other financial considerations.

Conclusion:

Developing the Library's long-term capital plan is a complex process in which many factors must be weighed in order to prioritize from a slate of possible projects. As a first priority, the Library must address state-of-good-repair issues in 99 branches. All projects should support the Service Delivery Model, meet established planning criteria, and further the Library's strategic priorities. From time-to-time, the Library is presented with proposals outside the Library's existing capital program that it may be beneficial to pursue. Using the planning framework to evaluate these proposals will position the Library to take advantage of new opportunities without compromising the Library's commitment to its strategic objectives, which include maintaining a state-of-good-repair in all branches as a first priority.

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List of Attachments:

Not applicable.