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Recent developments in Quebec concerning the normalization and performance measure of public library services

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RECENT DEVELOPMENTS IN QUEBEC CONCERNING THE NORMALIZATION AND PERFORMANCE MEASURE OF PUBLIC LIBRARY SERVICES
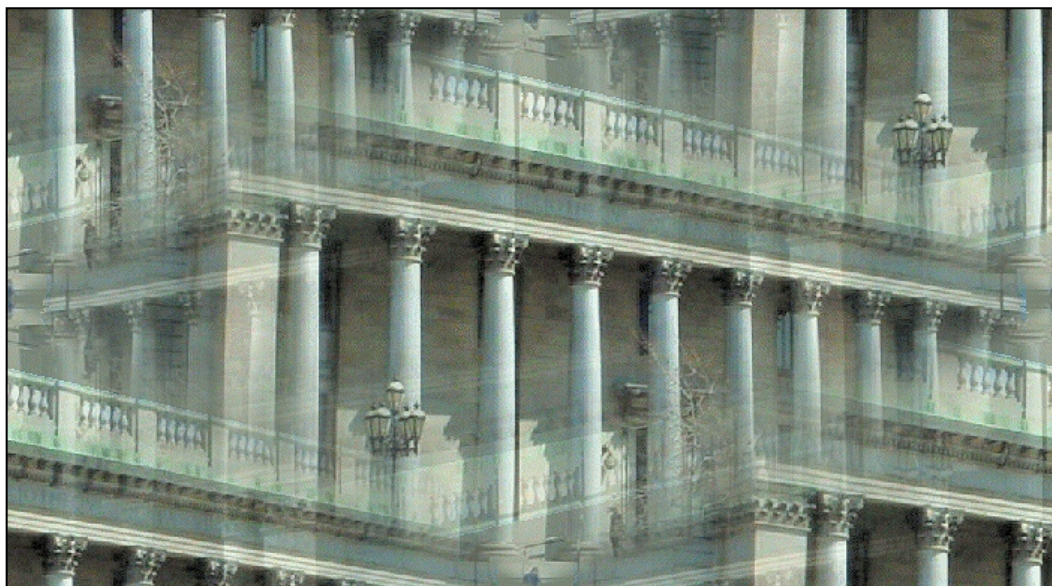
Abstract

Recent developments in the public libraries of Quebec, particularly in the merged municipalities, are presented as examples. The analysis on the state of this library system revealed an imbalance between the service offer and the demand. Compared to the Standards of Quebec" and other urban library systems in Canada, certain borough libraries of Montreal demonstrate marked deficiencies to the spaces and documents. Concerning the current library service, major disparities from the point of view of socio-demographic characteristics demand. Re-evaluation of the location of certain points of service and the possible implementation of auxiliary services. The consolidation envisaged for the new library System of Montreal will realized by creating new minimum service standards favoring levels of service offers and groupings of families of libraries, as well as introducing performance indicators. These two types of intervention will be defined according to a strategic plan of five axes or strategic objectives, 17 specific objectives and a little more than 40 management concerns. A first phase of the project is already underway to determine normative and performance indicators for 14 fields of standardization considered to be priorities. The new standards will be determined for each group or family of libraries in reference to an integrated analysis (simulation) by quartiles and comparative study of socio-demographic characteristics, resources and anticipated degrees of use of the resources and the services.

Finally, this presentation of initiatives by the new library System of Montreal, resulting of the amalgation of 28 municipalities localized on Montreal Island, illustrates inescapable, common and preliminary principles in the selection of information management, as well as of normative and performance indicators.

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Development of Québec public libraries : Profile of the standardization process

Before describing the project of conceptualization of a new standardization process now underway at the new public library system of Montreal, it is important to dress the principal stages of the development of Quebec public libraries. First of all, we should point out that the Quebec public library network is the responsibility of municipalities. The libraries of small municipalities, villages or parishes with populations of 5,000 or fewer inhabitants are served by a network of Public Library Regional Service Centres (Centres régionaux de services aux bibliothèques publiques, CRSBP), non-profit private corporations that are financed largely by means of subsidies paid by the Ministry of Culture and Communications of Quebec.These regional organizations will be concerned by supplying and cataloguing of documents for these small libraries. Besides, a great majority of the 165 public libraries localized in the largest municipalities (serving 5,000 or more residents), are managed by their municipal administration by virtue of their municipality's charter. The Ministry of Culture and Communications sets up different grant programs to support the development of library networks,

In the late 70's and early 80's, the Government of Quebec began a major development plan for public libraries by including grant programs targeting municipalities. At the same time, operating standards were proposed. These would be the subject of major revision in 1996, under the responsibility of three associations of the Quebec documentary sector (Assocaition pour l'avancement des sciences et techniques de la documentation (ASTED), Les Bibliothèques publiques du Québec (group of Directors of Quebec public libraries) and Regroupement des CRSBP)[1] These standards concern resources only and most of these resource indicators are established according to the population served.

In 1985 and 1986 we experienced major cuts in provincial government funding and an inquiry committee was then created (Commission on public libraries -- the Sauvageau Committee). Following this Committee's findings, new rules of grant allocation were established. Subsequent to revision of the parameters of the annual survey of statistical data in 1992 and revision of the standards guidelines, *Pour des bibliothèques québécoises de qualité : guide à l'intention des bibliothèques publiques,* in 1996, (joint project by the three associations : Association pour l'avancement des sciences et techniques de la documentation (ASTED), Les Bibliothèques publiques du Québec and Regroupement des (CRSBP), the following year the Government proceeded with consultations on the future of public libraries. These hearings enabled the Ministry of Culture and Communications of Quebec to implement, in 1998, a three-year public reading program. As government interventions centred only on enriching book inventories, they obtained rather mitigated results and did little to improve the quality of the documentary services. Finally, over the last two years, the Government of Quebec introduced some important modifications concerning the grants distribution program. Concerning the standards guideline, this one will be revised under the coordination from ASTED by Spring 2005.

Consequently, according to the statistical and financial data published in annual reports from ministries of the provinces of the Alberta, British Columbia, Ontario and Quebec in charge of programs to public libraries, we have to recognize that the public libraries of Quebec suffer from chronic underfunding compared with the libraries of the other Canadian provinces. For example, in 2001, the public libraries of Quebec spent 30.1% less money per capita (or $27.35 CAN / pers.) compared with an average spending of $35.58 CAN by the libraries of three other large Canadian provinces: Alberta, British Columbia and Ontario. This underfunding has the effect of considerably reducing inventory renewal; public libraries in Quebec have 2.58 books per capita compared with 3.02 in the three other provinces, a deficit of 17.1 %. It is especially at the level of personnel that we find a more substantial deficit, in Québec there is 0.63 FTE per 2, 000 inhabitants compared with 1.04 in the other three provinces (a deficit of 65.7%). Finally, overall library use is far less with just 5.9 loans per capita compared with 10.12 in these provinces (a deficit of 71.5 %).

Finally, the merging of municipalities in January 2002 and the opening, in 2005, of the Grande bibliothèque du Québec, have had and will have, major impacts on the development of the Quebec public libraries and more specifically at Montreal.

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[1] *Pour des bibliothèques québécoises de qualité : guide à l'usage des bibliothèques publiques*. Montréal : ASTED with Les Bibliothèques Publiques du Québec et Le Regroupement des CRSBP du Québec. 1996. 104p.

Consolidation of the library system and conceptualization of new standards in Montreal

Following the merger of 28 municipalities on the Island of Montreal, according to the ideas generated of the Montreal Summit in 2002, it was inevitable that we would have to consolidate the library system, considering as "proximity service" under the responsibility of each borough. This was done by analyzing the situation (the diagnosis) and by the consolidation plan. That one should include strategic axes and specific objectives. The realization of these specific objectives would be assured with the aim of the infringement of thresholds defined by minimal standards of service and estimated by specific indicators of performance at each of the fields of normalization.

Considering that there was a gap between supply and demand (that is the deficiency of the resources required by virtue of expected needs and of levels of use of the services and the documentary resources anticipated by comparison with tendencies followed by large Canadian Public library systems with superior performance), and disparities in the resources and socio-demographic characteristics among the boroughs of the new city, new standards favoring the diversification of the levels of documentary services must be conceived. As an example of evaluation development models we are presenting the project led by the Montreal Public Library as a "work in progress."

This project illustrates the importance to define minimum standards and determine performance measures according to the mission and specific objectives of the Organization.

Description of the new public library system of Montreal

Statistics for 2002, following the merger of 28 municipalities on the Island of Montreal, show that the new library system welcomes a little less than 6 million visitors (entries) and makes about 12 million loans. In addition, this network, which has more than 900 employees (924.4 FTE) in some 60 buildings (the library system of the former city of Montreal had only 26 branches), preserves, manages, develops and promotes a stock of several million documents. A Bookmobile as well as mail and drop-off services for the elderly add to this service offering. Including centralised services (Main library (adults and children sectors) and Sound-recording unit), there are about 4.9 million printed monographs (that is 2.68 books per inhabitants), 11, 000 periodical subscriptions, almost 390,000 audiovisual documents and nearly 104,000 documents of different categories. The whole represents an investment of about $69 million CAN a year.

As for the population of the new municipality of Montreal, it now totals 1,812,696 inhabitants. The library system succeeded in reaching 36.3 % of the total population. In certain boroughs, more than two thirds of the residents were and are active members.

The entire library system possesses 320 public workstations providing access to the Internet and 24 documentary management computerized systems using 8 different softwares. In this regard, major investments are foreseen in 2004 to begin the harmonization of the systems for all the libraries of the Island of Montreal.

New public library system of Montreal

Service points

Borough limit
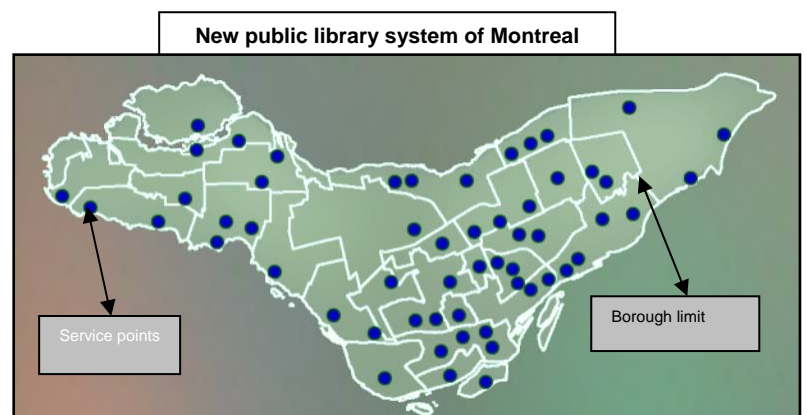
Finally, it is important to mention the Associate Director of Public Libraries of Montreal with centralised units concerning Acquisition,Cataloguing, Processing and Expertise, assigned to Planning and Development of Library System, is in relation with the Directions of boroughs libraries to : contribute to the development of new programs, facilitate the acquisition and cataloguing process, assure the technical support for the integrated library system, produce policies and procedures, promote and advocate the library services to the population and stakeholders and finally collect statistics, propose standards and evaluate the performance of services points.

Diagnosis : functional portrait of the Montréal libraries

Following the merger of the former suburbs and city of Montreal, the government of Quebec and the City of Montreal realized the necessity of analyzing the state of the library system, to determine priority improvements and plan its consolidation. The Service of cultural development of the City of Montreal and the Ministry of Culture and Communications of Quebec shared the responsibility of carrying out this diagnosis. It aimed at profiling the situation of the libraries of the Island as a   whole, both internally (resources) and externally (utilisations figures) by examining the following sectors:

- human and documentary resources and buildings;
- services to the library users;
- services to libraries;
- clients or library users;
- new technologies;
- performance of services;
- service area.

This work was overseen by the Committee on the minimal standards of services, which we will describe a little farther on, including the mandate, and the participation of representatives and managers of the city boroughs and of the central services. A preliminary report was submitted to the Ministry of Culture and Communications of Quebec in August, 2003. An improved version including a more detailed description of the strengths and weaknesses of some components of the library system and a comparative analysis is now underway.The purpose of this new version is to facilitate the identification of priorities of consolidation and development. This will support our negotiations with the Ministry of Culture and Communications as well as help to plan the upcoming consolidation of the library system, to develop new standards adapted to the application of new strategic developmental axes to better adapt the service offer to the diverse levels of documentary services in Montreal and to introduce performance indicators.

Minimum standards of service and performance indicators

The Government of Quebec, by decreeing and defining the specific legislative framework in the municipal merger process, obliged the former cities and towns to set out and provide minimum service standards. They must fix the level of services in each of the boroughs to assure service offerings in municipal libraries. The borough budget must be established by respecting these minimum service standards. The objective of establishing such standards is mainly to secure equality in documentary services for the citizens of the 27 boroughs by protecting a minimum threshold defined by norms.. Furthermore, by virtue of this legislation, the application of standards may not in any way compromise the autonomy of local library service management by Direction of boroughs. This is no mean feat, requiring a reasonable limit on the projected normalization process.

By virtue of this major administrative reorganization, the Direction of the Montreal public libraries wanted to use this opportunity to give to the new library system standards of quality and performance indicators. In accordance with studies showing disparities in socio-demographic factors, deficiencies in resources and imbalance in the service offer, the new standards have to favor the diversification of service levels throughout the territory of the Island of Montreal, according to parameters appropriate for each of the groups or the families (in reference to an analysis, integrated by quartiles, and a comparative study that considered the socio-demographic characteristics, resources and anticipated degrees of use of the resources and the services and the proximity of service points) of libraries, and the reorganization of the new library system.

To this end, the Direction of the Montreal Public libraries, with the cooperation of the borough administrations, created, in the spring of 2003, a Committee of Minimum Service Standards and gave it the following mandate:

- to express strategic orientations and specific objectives of library services;
- to propose criteria or application bases for norms proposed according to the recommended services and to the state of disparity of the current resources;
- carry out analyses and required simulations by taking into account criteria or application bases recommended for each of the specific objectives to fix just and fair minimum thresholds;
- identify the relevant performance indicators for each of the minimum service standards retained;
- clarify harmonization efforts of information management to grant and to propose modalities to achieve goals;
- recommend a strategic plan of application and the phases of establishing the new minimum service standards;

- devise appropriate follow-up reports integrating the selected performance indicators (as scorecard).

According to these specifications, This mandate includes three facets : conceptualization of minimum standards of services, determination of appropriated performance indicators and harmonization of information management.

The purposes of this mandate are :

- to assure the equity of library services to each montrealers[2];
- to improve the effectiveness of service points;
- to optimise the efficiency of library programs;
- to facilitate the consolidation of the new library system and the strategic planning of activities;
- to assure the relevance and close correspondence of standards according to socio-demographic factors;

Considering the scale of the work, schedules were extended to allow the application of the main minimum standards as well as of performance indicators by the end of the current year. In addition to this work, a sub-committee of the Committee of Minimum Service Standards was appointed to make a more specific diagnosis of all the policies and procedures of documentary treatment. In the autumn of 2004, the Committee of Minimum Service Standards must propose the application of optimum practices of documentary treatment.

First, the committee defined the specific objectives which can be realized more easily with the use of minimum service standards. As mentioned by David Fuegi in his paper of allocution[3], provided in the same Joint session program with the Section of public libraries and Section of Statistics and evaluation, who described the British standards, the definition of specific goals is essential to proposing relevant quality standards in furnishing a service required by the served clientele. The definition of such specific objectives allows us not only to direct the action plan but also to make budget choices, to facilitate the creation of a priority action plan and to better frame the evaluation of the performance. A first exercise, focusing more on current activities, resulted in the proposal of 51 specific objectives.This operation required profound revision of strategic axes and specific objectives according to the mission of the libraries of Montreal and the action priorities resulting from the analysis. A more systematic approach focusing on management through goals enabled us to give more definition to action priorities. We will clarify this further on.

As well as assuring the supervision and   validation of the analysis work, the service standards committee defined the parameters of its mandate to well define its reach regarding the execution of the diagnostic of the state of the operating situation and the consolidation of the library system Furthermore, it identified the sectors in which stardardization could be useful to be developed and will be susceptible to future interventions, the main concerns of management and activities appropriate to each.

The following six sectors   of standardization were retained:

- **services :** reference, loan, user assistance including consultation of electronic resources, document reservation, education, clientele with reduced mobility, outreach, renewals, fees, core list of services and opening hours;
- **human resources :** staffing, ratio per capita, adequacy of required staff taking into account rush hours, training, etc.;
- **collections :** quantities required for each of the document types and support according to targeted clientele (adults, children, young adults, elderly, ethnic groups, weak readers and students), application base of the allocation indices, renewal of collections, number of copies, optimal rotation of collections, proportion of Quebec editions, specific clientele;
- **spaces :** location of the points of service, required dimensions, correlation of spaces according to activities, functionality and maintenance, accessibility and equivalence according to the types of clientele;
- **electronic services :** organization of sufficient spaces, renewal of basic collections, facilities and equipment adapted to the service offer and new equipments, minimum threshold of services, staff training and public education;
- **public information and educational activities :** organization of dedicated spaces, documents specialized staff, Staffing required, number of activities, outreach (collections, staff, clientele).

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[2] For reference see the model on the evaluation of social impact of public libraries proposed by the Department of Information Studies of Sheffield University : Usherwood, Bob et Rebecca Linley. 2000. Evaluating equity in public library services. *Journal of Librarianship and Information Science* 32 (June): 72-81

[3] Fuegi, David. 2004. Recent developments in the application of statistics, standards and performance indicators in public libraries in England. In *Libraries : Tools for education and development – World Library and information Congress: 70th IFLA General Conference and Council*. Buenos Aires: IFLA, activité n° 131.

The realization of this multi-action project is extremely important, a plan that will determine how the new library system is consolidated and which is indispensable to the successful application of the consolidation plan. The members of the committee are : managers of library services of boroughs, specialists of Planning and development of library system, some directors and specialist of financial resources from Finance Municipal service. Beyond the characteristics revealed by the analysis and the operational analyses as well as the more specific projections ensuing from the first exercise, the standards committee must first consider the repercussions of the cultural policy statement of the new city, a policy that must be finalized by autumn 2004 and that stems from ideas generated by the Montreal Summit in 2002. It must also consider operating results since the merger, among them the impact of user migration, the beginning of work on harmonizing the systems and the impact of work by political consulting committees. Furthermore, the opening of new units in the library system deserves an updating of examinations undertaken within the framework of the analysis.

Finally, the development of new standards must take into account the upcoming opening of the *Grande bibliothèque du Québec*, combining the vocations of national library and research centre as well as public reference library.

Collaboration on the international level

By participating in the work of various committees of experts looking into this matter, particularly the International Standards Organization (ISO) and the IFLA, it seemed inevitable that the Montreal public library system would be inspired by recognized practices. So, at the level of performance evaluation, undoubtedly, it is clear that we will have to refer to the standard ISO 11620. Nevertheless, to have legitimacy, we can and must develop our own performance indicators for certain activities, among them, the evaluation of user migration.

However, as for the crafting of a consolidation plan according to minimum service standards, strategic economic planning and management through specific goals, it seemed to us extremely relevant to have recourse, in particular, to British expertise. In this regard, the Library and Information Statistics Unit (LISU) of Loughborough University has been associated, since August 2003, with the Montreal public library project and has made various observations and given us professional advice that has guided the project team. Also, David Fuegi of MDR Partners has been consulted at certain stages of the project. Future exchanges with other institutions in other countries are envisaged, especially those that have adapted similar approaches, such as those in Europe.

Evidently, the definition of strategic axes and specific objectives in the Montreal public library system is largely inspired by work done in this field in Great Britain. We particularly referred to the plan of British development presented in 2003 by the Department for Culture, Media and Sport in its document, "Framework for the Future : Libraries, Learning and Information in the Next Decade[4]". This plan is based on standards proposed before in the document: "Comprehensive, Efficient and Modern Public Libraries; Standards and Assessment[5]".

Strategic plan of the Montreal public library system

To redefine the new stardards that must be recommended for Montreal, it seemed relevant to opt for a transverse approach inspired by management through goals. Therefore, according to the specific objectives retained, the identification of normative indicators (minimum service standards) and of performance indicators, to measure the degree of infringement of the standards, seems more coherent and more justifiable.

A strategic planning sub-committee was put in charge of developing a strategic plan and submitting it to the minimum standards committee. This plan contains five strategic goals or axes and 17 specific objectives. The sub-committee also raised a list of management concerns associated with each of these specific objectives. For the moment, there are 46 of these concerns. Finally, certain means (50) allowing us to realize these management concerns were identified.

We present in next Table these five (5) strategic goals and 17 specific objectives who must be operated during the next years.

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[4] Framework for the Future : Libraries, Learning and Information in the Next Decade. London: Department for Culture, Media and Sport, 2003. 59p.
[5] *Comprehensive, Efficient and Modern Public Libraries; Standards and Assessment.* London: Department for Culture, Media and Sport, [2000]. 18p

Strategic axes	Specific objectives
1 **Insure the Montreal population accessibility to a quality service** offer.	**1.1.** Offer library users a network with sufficient facilities, equipment and physical space to meet their needs. **1.2.** Offer users a range of common and user-friendly services for all boroughs, integrating the local peculiarities. **1.3.** Offer a varied range of documentary and information resources which meet the needs and preferences of the users. **1.4.** Offer users a quality client service which depends on the excellence of the human resources. **1.5.** Assure services offered by the Montreal libraries and the National Library of Quebec are complementary.
2 **Increase readership and library visits (number of entries) to 0-17 years.**	**2.1.** Supply the youth clientele with more and diversified services better adapted to its needs. **2.2.** Develop and set up an approach-family
3 **Strengthen the use of libraries as tool of integration and social development.**	**3.1.** Maintain and develop collections and specific programs adapted to the targeted clienteles. **3.2.** Contribute to local efforts in the prevention of the truancy. **3.3.** Contribute to the access to culture and to its democratization
4 **Strengthen the role of libraries as community information centers.**	**4.1.** Develop and retrieve sources and local collections of community information. **4.2.** Facilitate the participation of the citizens in the life of libraries. **4.3.** Optimize the use of the resources of libraries by local groups. **4.4.** Support and encourage the exchanges around the local stakes.
5 **Contribute to making Montreal a city of reading and knowledge.**	**5.1.** Promote reading . **5.2.** Develop, with the other municipal services, a step integrated by promotion of reading within the framework of municipal actions. **5.3.** Favor the development of a culture of continuing education.

Among these 17 specific objectives, we identified two levels of intervention :
- consolidation of library system;
- strategic planning development.

Among these 17 specific objectives, we have identified the following two levels of intervention: consolidation of the system and strategic planning. The specific objectives 1.1 à 1.5, 2.1 and 3.1 can be associated with the consolidation of the library system, whereas the others are more in the order of a plan of strategic development, over the more or less long term. As a result, we considered that the development of minimum service standards first had to be carried out according to the orientations given to the consolidation of the library system.

Furthermore, we placed priority on 24 management concerns (that must appear at the 3rd level of the list of the specific objectives presented above) associated with the specific objectives 1.1 à 1.5, 2.1 and 3.1 and began the selection of the main minimum standards to be established, i.e. the minimum standards considered to be absolutely necessary that will assure the framework of the consolidation of the new library system.

Consequently, the sub-committee of strategic planning retained for this first phase 10 management concerns and gave priority to 14 fields of standardization judged to be the essential premises for the new standardization plan. These 14 fields of standardization are as follows:

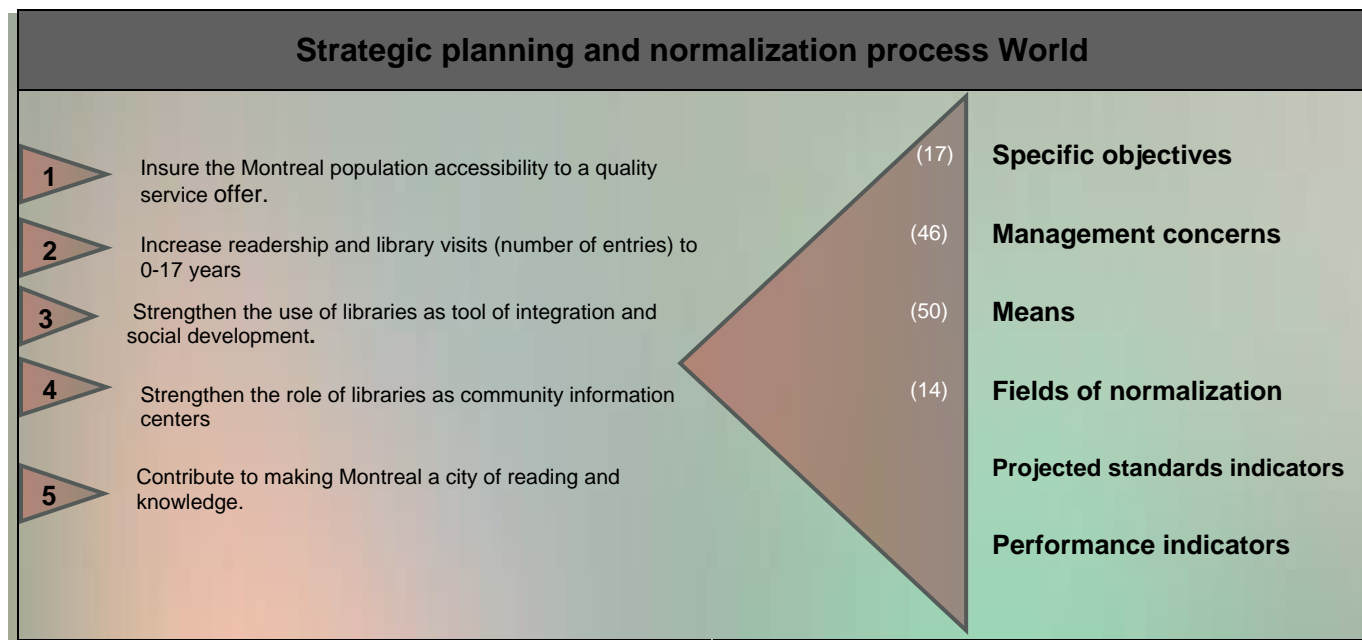| Specific objective/Management concerns (Phase 1)	Fields of normalization (priority)
1.1 Offer library users a network with sufficient facilities, equipment and physical space to meet their needs. • **Be equipped with adequate physical spaces and in sufficiency.** • **Insure to the users the proximity of libraries.**	• **Standard of minimum space;** • **Reduction of the deficit of building maintenance;** • **Areas of service according to population density, proximity and certain other factors and the levels of required service;** • **Criteria of location of the points of service and the auxiliary services.**
1.2 Offer users a range of common and user-friendly services for all boroughs, integrating the local peculiarities. • **Develop criteria to assure the availability and the quality of the common services.** • **Insure a minimal number of opening hours all the libraries.** • **Harmonize the integrated library systems. harmonized.**	• **Core list of the basic services to be offered free of charge;** • **Loan and universal return in the whole of the library system;** • **Minimum number of opening hours;** • **Computer system of documentary management.**
1.3 Offer a varied range of documentary and information resources which meet the needs and preferences of the users. • **Make an upgrade of the collections of the sub-endowed libraries.** • **Define the main parameters of the development of collections in other languages (than French and English) and agree of a sharing of the tasks and expertises of the units of Library system.**	• **Criteria of endowment of collections compared to a plan to upgrade collections aiming to determine optimal quantities of documents required;** • **Axes of development of linguistic collections.**
1.4 Offer users a quality client service which depends on the excellence of the human resources. • **Have qualified human resources and in sufficiency.**	• **Human resources according to the levels of service, opening hours, the population served and educational and public information activity needs;** • **Distribution of human resources by categories of employees.**
2.1 Supply the youth clientele with more and diversified services better adapted to its needs. • **Make accessible to the clientele youth of the specialized human resources.**	• **Allocation of the human resources for the youth sector.**
3.1 Maintain and develop collections and specific programs adapted to the targeted clienteles. • **Maintain and develop programs in technological literacy.**	• **Free accessibility to the Internet.**

Regarding these 14 fields of normalization, different analyses and simulations will be carried out over the next few months to determine the number of normative (minimum standards) and performance indicators. It is difficult for the moment to overestimate the number of indicators which can be proposed following this work. As for the implementation of these new standards and performance indicators, scheduled for 2005, it will have to be the object of the first phase of the action plan for the application of these measures next year. At the time of this writing, we are at the stage where we are determining, for each of these 14 standardized fields, the list of dependent variables to identify the components of the eventual indicators, determine indicators that must be simulated as well as the potential bases of application to be tested (eg: population density, indication of socio-economically underprivileged population, degree of clientele proximity, etc.), while favoring diversification of standards according to groupings (or families) of libraries and the l level of service offer. For example, standards indicators could express themselves as follows:

• Surface area required according to the level of services (indicator of the standards in human resources and inventories of required collections) and of socio-demographic factors (as population density within radius of service area);
• Number of FTE required according to the population density within the radius of service offer and the level of offered services and an early indication of use (indicate to define);

- Number of books required in function of rotation rate X and of a anticipated lending rate per capita Y—the whole of which can be the object of a stronger indication taking into account the use and the ageing of collections compared to a level of targeted service or a targeted rate of use.

Furthermore, next autumn, in the light of the recognized indicators either by the International Standards Organization (ISO 11620) or by American Library Association or as needs be, following our own model, measures of performance both at the resource and at the output levels will be determined.

So we can schematize our model of strategic planning and normalization as follows:

Strategic planning and normalization process World

1	Insure the Montreal population accessibility to a quality service offer.	(17) Specific objectives
2	Increase readership and library visits (number of entries) to 0-17 years	(46) Management concerns
3	Strengthen the use of libraries as tool of integration and social development.	(50) Means
4	Strengthen the role of libraries as community information centers	(14) Fields of normalization
5	Contribute to making Montreal a city of reading and knowledge.	Projected standards indicators
		Performance indicators

Finally, before proceeding to the second phase of creation of minimum service standards, we intend to begin the process of harmonizing management information management information to make sure of the comparability of the performance measures that will be eventually put into effect. Also, we intend to develop follow-up tools or quality control measures with a scorecard, not only to make sure of the efficiency of the activities put in place in view of the strategic plan but especially to evaluate the outcome resulting from this firs phase of the implementation of the strategic plan.

Examples of application of the strategic planning and normalization model

According to our objective to facilitate the comprehensiveness of our process of integration the normalization in the strategic planning and consolidation model of the resources developed by the new Library system of Montreal, we describe two examples. First one contributes to define minimum standards of spaces or areas of library buildings and determine the parameters of optimal area of services in decreasing the deficit of required spaces of buildings and reduce the disparity of proximity indicators of present service points in comparaison with population density.The second application permits to estimate the optimal documents holdings, to determine the criteria of endowment of collections and to define the development orientations of collections in other languages than French and English.

Areas (or spaces) of library buildings and area of services

According to *Programme d'aide financière aux équipements culturels*, *[Grants Program to cultural equipments]* (Québec, juin 1991, the required area of library building is define in function of the served population. Consequently, Montreal public libraries should have an area equivalent to 51 m^2 / 1 000 habitants. Now, the present areas of service points of Montreal public library system indicate us that 50 % of boroughs offer service points with a large deficit of areas. Also, the deficit of spaces is very variable for 15 boroughs and is larger in the former Montreal territory specifically in the central area of the city in which the density of population is substantial.

This disparity of deficit in spaces according to required space is well illustrated by the next map. Less than 20 % of boroughs have less than 50 % of required space recomanded by *Standards of Quebec*. But 40 % of boroughs are served by libraries localized in buildings with larger space (or area) as recommended by *Standards of Quebec*.

Finally more than 60 % of boroughs offer less space in comparaison with the mean space (57 m^2 / 1 000 inhabitants) of large canadian public libraries serving 500 000 inhabitants.

Besides, the Montreal territory is characterized by a marked variety with the concentrations of population. For example, **50 %** of montrealers are localized in 7 boroughs. These 7 boroughs cover **33 %** of territory superficia on
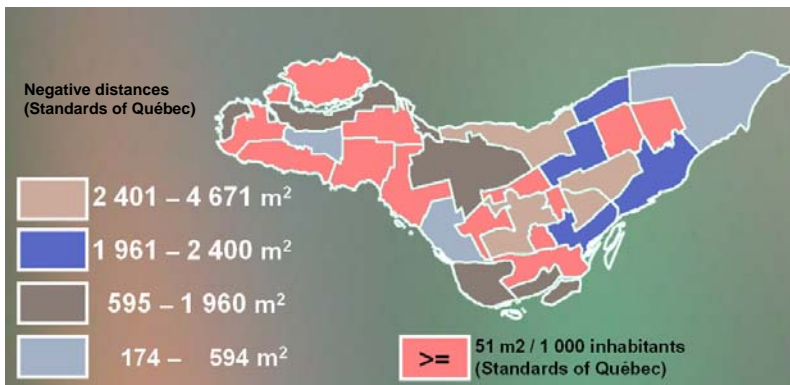
Montreal Island. According to *Standards of Quebec*, the population to be served should be localized inside of a radius of service equivalent to 1,5 km. We illustrate on next map the service areas (in term of radius of service). The concentration and overlap of radius of service, localized specifically in the center of the Island of Montreal, should not be considered as overestimates service to real needs. Some simulations are presently analysed to identify the real deficit of service points or library services on the territory. The simulation of radius of service equivalent to 0,75 km for libraries localized in borough with a very large density of population

should be probably more appropriate, illustrating the deficit in service points. Also, for boroughs with less density of population, the size of radius of service could be increased more than 1,5 km as recommended by *Standards of Quebec* as 2,0 or 2,4 for boroughs with weak density of population. This analysis will facilitate the determination of basis or criteria of application of minimum standards in function of proximity indicator, density of population, distance between neighbour libraries and socio-demographic characteristics of boroughs.

This approach is used to optimise the reduction of disparities in term of served population. The new criteria of application of minimum standards based on density of population and other socio-demographic factors instead of served population is more appropriate and relevant in regard with a urbanized territory as in Montreal and open new perspective levels of services and inter-boroughs cooperation.
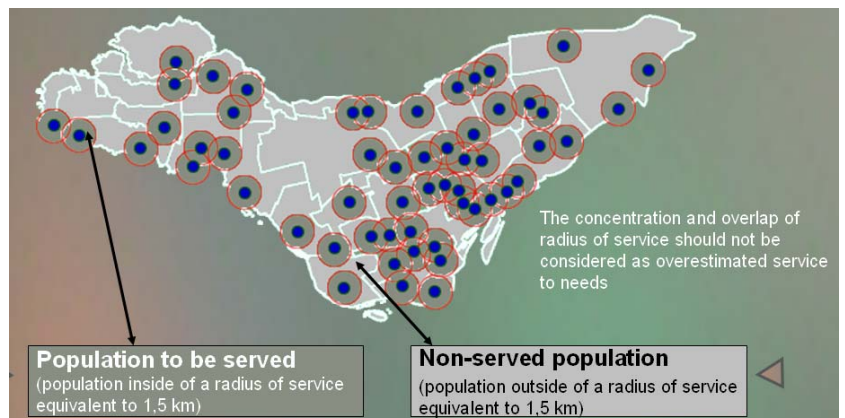
The next map illustrates this disparity of served population in boroughs.

Compared to the model of strategic planning and normalization, we must assure to the Montreal population the accessibility to a quality service offer. This purpose could be reach by libraries localized in buildings with sufficient Facilitie, equipment and Physical spaces to meet the library user needs.
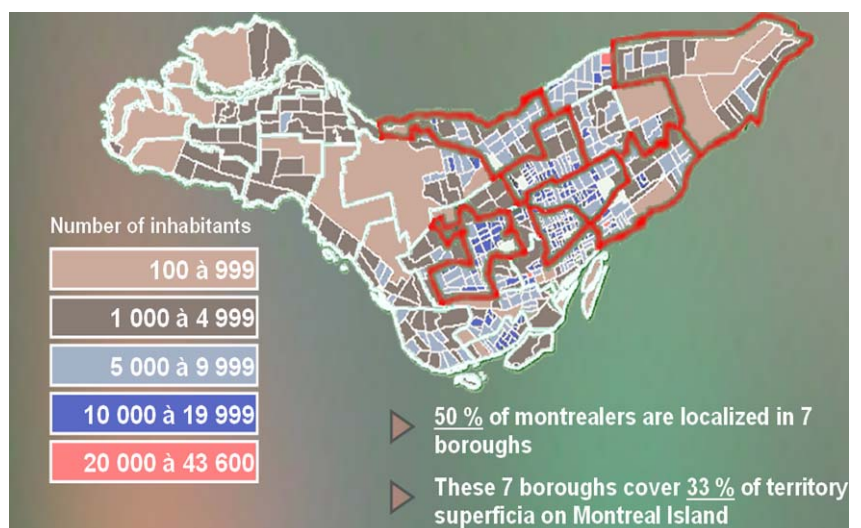
Two management concerns are to be considered : adequate physical spaces and in sufficency and proximity of libraries. Three means should be used :

- the determination of minimum standards of space;
- the definition of areas of services (in function of density of population);
- the offer of auxiliary services and service points (in function of dimension and localization of areas of services).

The consolidation of service points will be determined by these fields of normalization : standard of minimum space and areas of services segmented (or defined) by density of served population, proximity indicator, levels of services and some other factors to be determined. These fields of normalization depend these six projected indicators :

- area required (defined in function of levels of required services and socio-demographic factors;
- correlation indicator of space categories (by functionalities, activities or services);
- dimension of areas of services;
- density of served population localized in a radius of service (0,75, 1,5, 2,0 or 2,4 km); sera densité de population à l'intérieur des rayons de desserte retenus (0,75, 1,5, 2,0 ou 2,4 km);
- inter-libraries distance;
- non-served population.

To evaluate the degree of infringement of these normative indicators, our model provides the following five indicators of performance:

- density of served population by service points;
- migration rate;
- population localized ouside of service area;
- population localized ouside of borough;
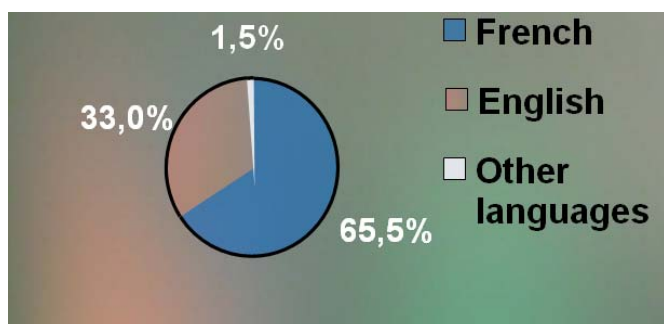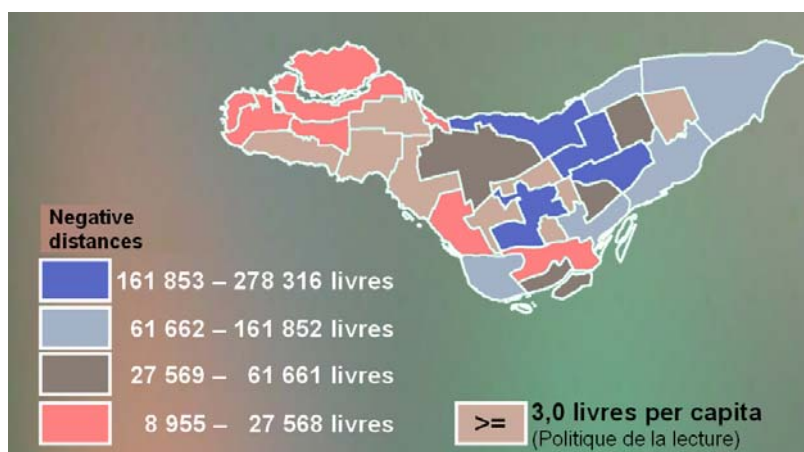- percentage of target population registered.

The strategic planning and normalisation process model combining all these elements is illustrated in next table.
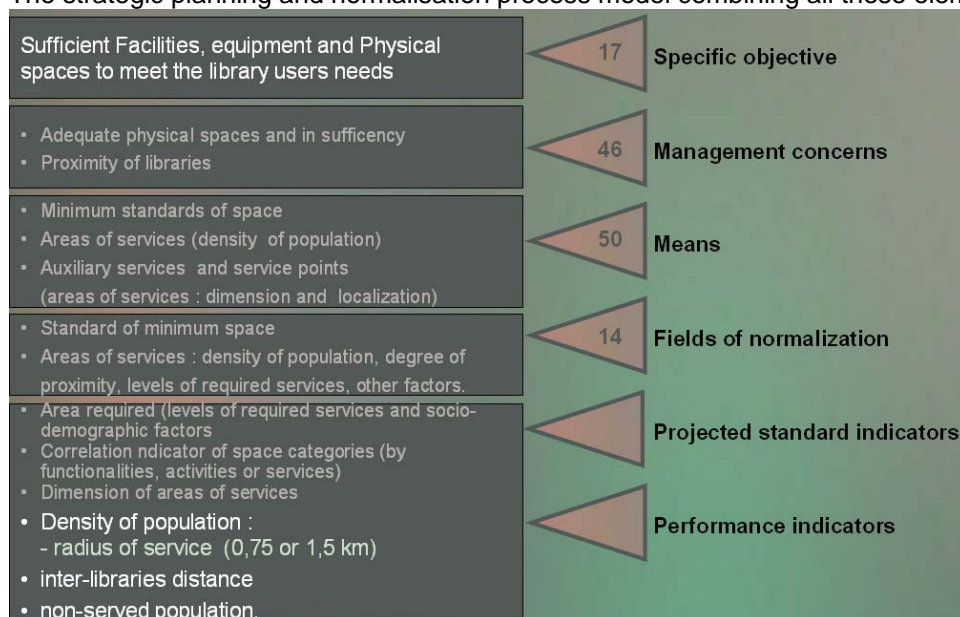
Documentary and information resources

According to *Standards of Quebec*, libraries of Montreal should have a holding equivalent to 2,2 books per capita. Some important deficit have to be reported because a little less of 60 % of boroughs (16/27) have less of 2,2 books per capita. Also, about 67 % of boroughs (18/27) have less than 3,0 books per capita. So to have an equivalent holding as recommended by the National promoting program of books and reading it would be necessary to add a little less of 1 550 000 books to present collections. Again we report a large disparity of deficits of holding of books in comparaison with required collections. Some boroughs have larger deficit than 275 000 books and others a deficit equivalent to 9 000 books. Nine boroughs have more than 3,0 books per capita. The largest deficit are in boroughs localized in middle of Island of Montreal. The next map illustrates this disparity of book holding deficits.

Besides this deficit in documentary resources, we find a general absence of books in other languages than in French and in English. Nevertheless more than 70 % of the immigrants who settle down in Quebec lives in Montreal and are distributed unevenly on the territory of the island. Quelques données statistiques sur l'état des collections adaptées aux groupes ethniques sont présentées dans le tableau suivant. Some statistical data on the state of collections adapted to the ethnic groups are presented in the following table. These figures illustrate the absence of correlation between the holdings of books in other languages and linguistic groups of population in boroughs of Montreal.

Negative distances

■	161 853 – 278 316 livres
■	61 662 – 161 852 livres
■	27 569 – 61 661 livres
■	8 955 – 27 568 livres

>= **3,0 livres per capita** (Politique de la lecture)

- French 65,5%
- English 33,0%
- Other languages 1,5%

So, by this second example, the plan of consolidation of the Libraries of Montreal still suggests assuring(insuring) the Montreal population the accessibility to a quality service offer but this time by developing and by maintaining a variety of documentary and informative resources in the preferences of the users. According to the table on strategic goals, it refers to the 3rd specific objective of first strategic goal.

Two management concerns are considered :
- upgrading of the collection for the sub-endowed libraries;
- Collection development by linguistic categories.

Some criteria of endowment of collections and an upgrading plan will be defined to reduce reported deficits. This collection development will be conducted by actions on these two fields of normalization :
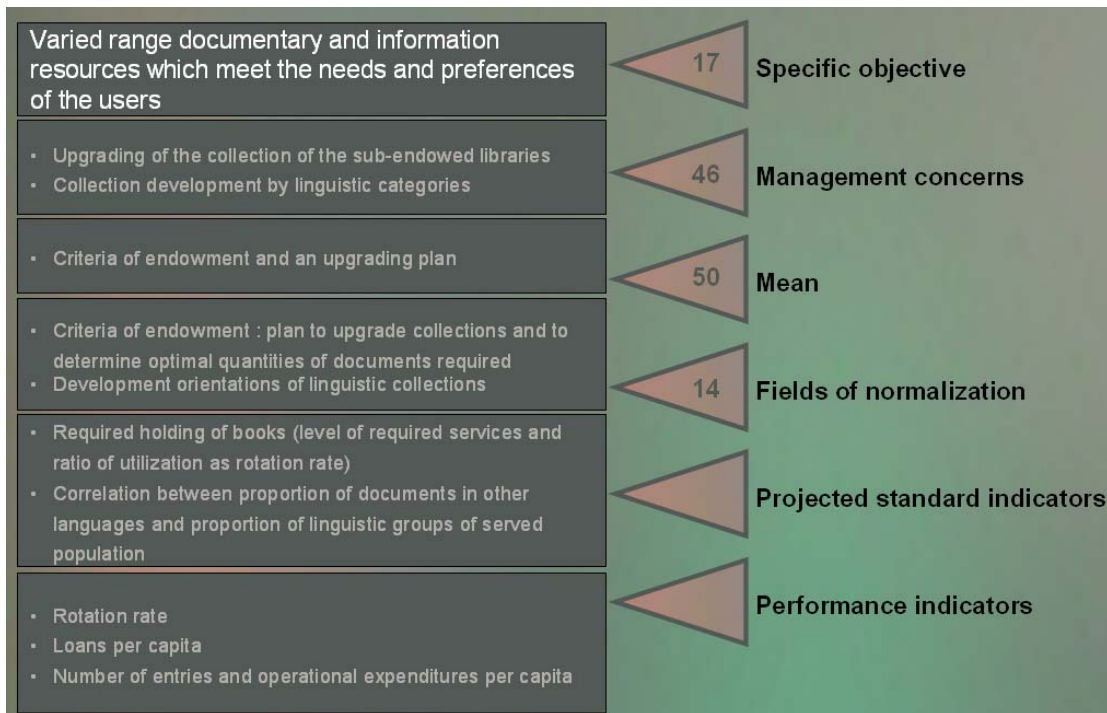
- the determination of optimal quantities of documents required and criteria of endowment (plan to upgrade collections);
- the definition of development orientations of linguistic collections.

The following normative indicators will be determining with the aim of the realization successfully of the specific objective:
- the required holding of books (in function of level of required services and of ratio of utilization as rotation rate);
- the correlation between proportion of documents in other languages and proportion of linguistic groups of served population).

Also, our model provide these performance measures : rotation rate, loans per capita, number of entries and operational expenditures per capita.

The strategic planning and normalisation process Model, combining all these elements, is illustrated in next table.

Varied range documentary and information resources which meet the needs and preferences of the users	17	Specific objective
• Upgrading of the collection of the sub-endowed libraries • Collection development by linguistic categories	46	Management concerns
• Criteria of endowment and an upgrading plan	50	Mean
• Criteria of endowment : plan to upgrade collections and to determine optimal quantities of documents required • Development orientations of linguistic collections	14	Fields of normalization
• Required holding of books (level of required services and ratio of utilization as rotation rate) • Correlation between proportion of documents in other languages and proportion of linguistic groups of served population		Projected standard indicators
• Rotation rate • Loans per capita • Number of entries and operational expenditures per capita		Performance indicators

Integrate system of standardization and performance evaluation of libraries

The consolidation plan of new Library system of Montreal will be conducted as illustrated by the Integrated system of standardization and performance evaluation of libraries[6]. This system could be described as explained in next paragraph.

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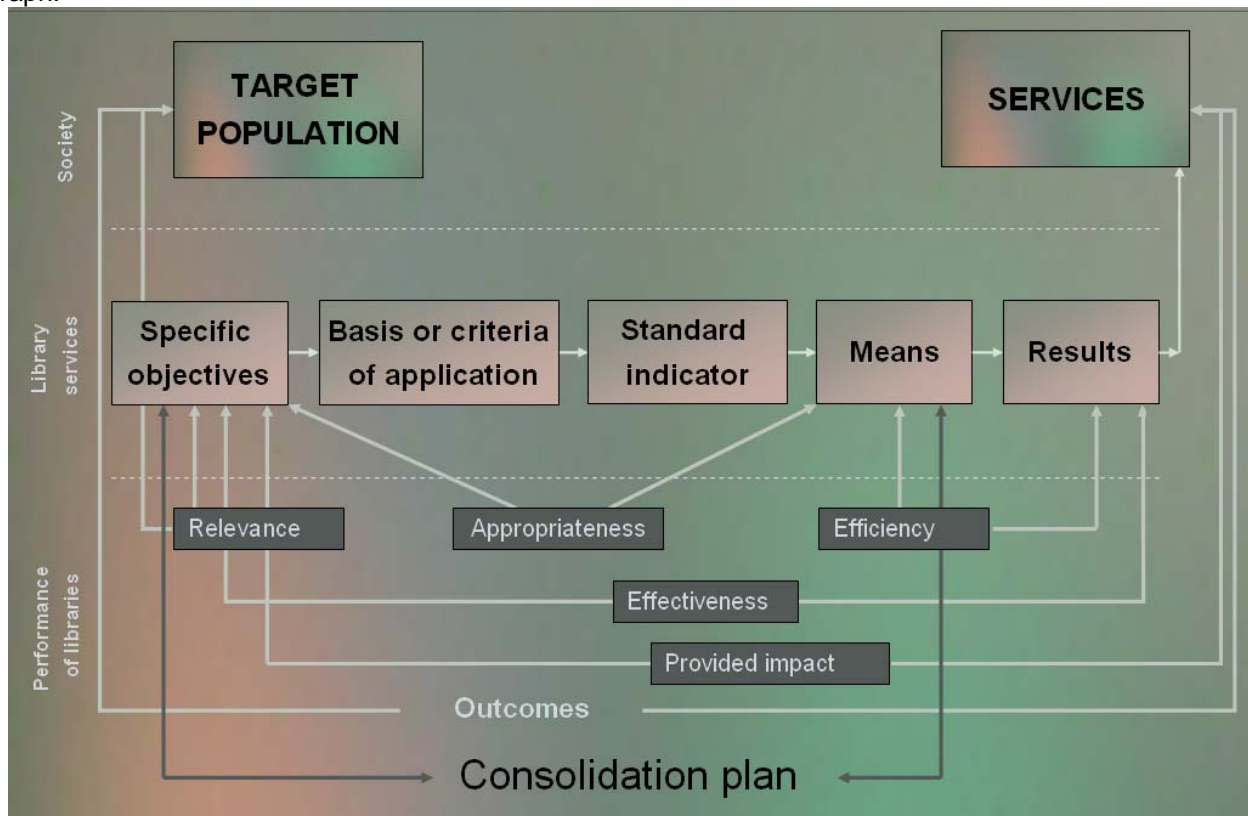
[6] Giappiconi, Thierry. 2001. *Manuel théorique et pratique d'évaluation des bibliothèques et centres documentaires.* Paris : Cercle de la librairie, 223p.

This one intervenes at two levels represented well in our plan. The median level illustrates again the dependence between the specific objectives of the library system and the normative indicators function of different criteria established by means of preliminary simulations.

As for the lower level, indicators of performance are selected to estimate:

- the relevance of specific objectives in regard with the needs of library users;
- the appropiateness of specific objectives and resources (documents, human resources, buildings and equipments), selected activities and services; evaluation of distance between specific objectives and means;
- the effectiveness of activities conducted by the library on social level (impact of documentary services and resources) and in terms of quality (satisfaction in regard of services);
- the efficiency of means used (staff, documentary resources and financial resources) from the point of view of the productivity while optimizing the costs of operation;
- the evaluation of impact of services in function of projected specific objectives;
- the evaluation of the outcome or of the impacts on served population in function of services offerred.

So, the minimal standards of service are in the heart of the Plan of consolidation and the introduction of the indicators of performance allows to make sure that not only the minimal standards of service are affected but that the Plan of consolidation comes true in a optimal way and allows the new library system to meet the needs adequately

Conclusion

We could conclude by considering that the recent developments in Great Britain as well as the project of new normalization begun by the Public Library System of Montreal exemplify a basic principle. The selection of indicators and measures of performance must always relate to the plan of strategic development of the library by referring to the specific objectives. Furthermore, the choice of statistical data, normative indicators and measures of performance must address the needs of the relevant stakeholder groups.

With regard to *Standards of Quebec* in comparison to the large urban library systems in Canada, certain libraries of the suburbs of Montreal are short of documentary and human resources. Benchmarking shows the need to reduce major socio-demographic disparities by reviewing the location of certain service points and the possible implementation of auxiliary services . As in the United Kingdom, the new Public Library System of Montreal will develop a new set of standards based on the identification of strategic axes and specific objectives. Looking at the benchmarks, it seems necessary that the new standards should define service levels based on groups of libraries.. Within the framework of the first phase of the project, an exercise of " prioritisation " of 14 standardized indicators will identify the main standards which will bring about consolidation of the new Library system.