

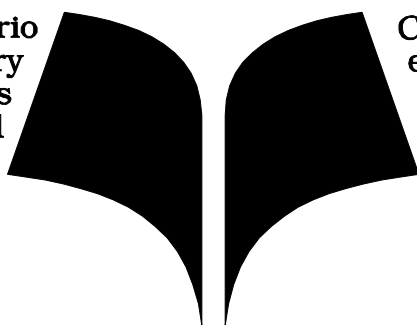
Ontario Public Library

Guidelines

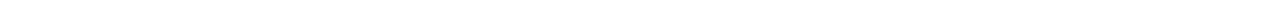
Fifth Edition

For Municipal and County Public Libraries

Ontario
Public Library
Guidelines
Monitoring and
Accreditation Council



Conseil de l'agrément
et du contrôle des Lignes
directrices pour les
bibliothèques publiques
de l'Ontario



Editorial Team

Ontario Public Library Guidelines Monitoring and Accreditation Council

*Member of the OPLG IT Guidelines Steering Committee.

ADMINISTRATORS OF MEDIUM PUBLIC LIBRARIES OF ONTARIO

Representative: Cindy Weir

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Representative: Vacant

SMALL PUBLIC LIBRARIES

Representative: Shann Leighton

EX-OFFICIO

Leanne Clendening (OLS-N)

David Allen (FOPL)*

Project Consultant

Frances Stocker, BA, MCLIP

Principal, Kestrel Info Services

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Ontario Public Library Guidelines Monitoring and Accreditation Council
Federation of Ontario Public Libraries c/o North York Central Library 5120 Yonge Street
Toronto, ON M2N 5N9
Telephone (416) 395-5638 Fax (416) 395-0743

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Background

The Ontario Public Library Guidelines Monitoring and Accreditation Council is pleased to present the Fifth Edition of the *Ontario Public Library Guidelines*, 2010.

The guidelines presented represent community-based norms for public libraries and public library development in Ontario. They are developed, monitored and revised by a broadly-based group, representative of the Ontario public library community.

The *Guidelines* aim to assist public libraries in developing and maintaining consistently strong public library service. They provide public library boards, managers and staff and local governments with up-to-date public library guidelines on policies, resources and services.

The *Ontario Public Library Guidelines* program provides an accreditation process to recognize the achievement of public libraries that meet the program's requirements. The *Guidelines* offer voluntary standards that individual public libraries can choose to follow or exceed, regardless of whether or not they decide to pursue accreditation.

With the Fourth Edition, a separate version was produced for the first time specifically for use by Ontario's First Nation public libraries. The development of a First Nations version of the *Guidelines* was a response to requests from the community for library guidelines that better reflect a First Nation public library context. Following the publication of the Fifth Edition, the First Nations version will be similarly modified and published in the near future.

Note on the Fifth Edition

Technology now permeates the work of the public library to such an extent that the need to revise the Guidelines to give more detailed attention to that area became evident. Council received funding to develop a new section on technology from the Ontario Ministry of Culture's 2008 \$15 million investment in public libraries. It was agreed that because technological issues also impact the guidelines' existing six sections, a new edition should be published. However, it should be noted that the Fifth Edition primarily focuses on modifying and expanding guidelines relating to the use of technology in public libraries. It does not attempt a comprehensive revision of all the guidelines, which will be the subject of a future revision which is scheduled for publication in 2012.

The Federation of Ontario Public Libraries and the Ontario Public Library Guidelines Monitoring and Accreditation Council gratefully acknowledge the support of the Ontario Ministry of Culture in funding this project within the Ministry's 2008 \$15 million investment in public libraries.

The peer audit process was an extremely positive experience. I was proud of the hard work that we had done in preparation for the audit and valued the expert opinions of my auditors. I would recommend this process to any library, big or small. The sense of accomplishment is great and the desire to improve and do better next time is even greater! *Sandra Weitzel, Dryden Public Library*

I would encourage every public library to make use of the accreditation guidelines. At the very least, they provide a solid foundation for the process of internal quality review. For us, especially as a system that experienced the usual post-amalgamation upheavals, the accreditation process has been a morale-boosting opportunity to highlight capabilities and accomplishments. After a successful audit, we are able to talk credibly about teamwork and perseverance and vision. Staff and Board members are delighted. *Deb Jackson, Haldimand County Public Library*

The Clearview Public Library Board recently completed a facility review of its main branch. The data that these guidelines provided have proven invaluable. The Board particularly appreciated the fact that the guidelines relate to 'Ontario' public libraries. I would not hesitate to recommend the guidelines as a sound resource for public libraries in Ontario, not only for the purpose of accreditation, but for ongoing planning for services and space. *Jennifer La Chapelle, Clearview Public Library*

I. Introduction

All Ontarians, regardless of where in Ontario they live and work, have a right to public library service that meets basic, widely accepted norms of library practice and service. The *Guidelines* offer a method for libraries throughout the province to meet basic service levels and to continue to grow to meet the ever-changing needs of their communities.

Goals of the *Guidelines*

The *Guidelines* have four principal goals:

1. To build upon and improve the current Ontario-wide public library infrastructure which connects individual libraries and enhances local service.
2. To maintain a public library infrastructure that is consistent and strong throughout the province by ensuring the viability of information access points in small and remote Ontario communities and providing them with a process for development to meet the changing needs and expectations of their clientele.
3. To make available to those public libraries which do not meet the *Guidelines* requirements a comprehensive process for improvement, thereby, over time, raising the level of public library service province-wide.
4. To recognize, through an accreditation process, the achievement of those public libraries which meet the *Guidelines* requirements.

Benefits of the *Guidelines*

➤ Evaluation of local library service and direction for development

The *Guidelines* facilitate an organized, objective approach to the evaluation of local library service. The *Guidelines* will ensure that a local evaluation process is fair and comprehensive, concentrating unduly neither on strengths nor weaknesses, but giving direction to and assistance with a review of the whole spectrum of services and operations.

➤ Assistance in the planning process

By using the *Guidelines*, the library will gain an understanding of those matters which require attention and upgrading and those which can be considered to be appropriately developed or superior in their function. From this assessment of the adequacy of current service delivery, the board and administration will be able to consider appropriate directions for development of the library and formalize these into an organized plan.

➤ Consistency of service across Ontario

Regardless of geographic location or size, a public library which meets the requirements of the *Guidelines* can be assured that it is equipped to contribute to the Ontario-wide public library infrastructure, to the greater benefit of its users and community.

I was pleased to participate as a peer auditor in the accreditation process. It gave our library a chance to return the favour as we had recently been accredited. It was a great learning experience to see where other libraries shine and how they make the most of what they have. It is truly inspirational and all done for the greater good of the customer. *Cindy Weir, Peer Auditor*

The North Perth Public Library is pleased to say that we have used the Guidelines extensively as we worked on developing and updating policies, assessing our shelving requirements and developing our Strategic Plan. We find the guidelines extremely helpful for the overall development of quality library service. It is our goal to request a review of our eligibility for accreditation consideration in the very near future. *Sheila Durand, North Perth Public Library*

Middlesex County Library proudly displays the Certificate of Accreditation at each of its 10 accredited branch libraries. The Certificate expires in April 2009. We will definitely seek re-accreditation at that time. We find that this is an effective way to let our citizens know that these libraries meet the standards for Ontario public libraries and we will continue to work towards maintaining this accreditation in the future. *Margaret Rule, Middlesex County Library*

➤ *Improved accountability*

As a result of implementing the *Guidelines* process, the library will be assisted in demonstrating the quality and value of library service currently being offered to the public and so improve accountability to the taxpayer. By adhering to a province-wide set of service expectations, the individual library will be in a better position to benefit from co-operation and sharing arrangements with other libraries in a province-wide library system, thereby demonstrating a commitment to maximizing the local tax dollar.

➤ *Enhancement of the library's position in the community and with funding bodies*

The *Guidelines*, and the plans developed as a result of their application, will assist boards with providing the justification for securing municipal and other funding to implement the plans. Libraries which achieve accreditation through the *Guidelines* program will reap the benefits of an enhanced profile and reputation in their communities and will demonstrate to their funding bodies that tax dollars invested in the public library are dollars well-spent.

Libraries should consider discussing the accreditation process early on with their municipal council, presenting it as an opportunity to work together on an important project and inviting council to be part of the process. This will have the effect of increasing the council's awareness of the work involved in accreditation, as well as its value and benefits.

Nature of the *Guidelines*

The *Guidelines* are essentially a developmental tool. The primary target group is small, medium and county public libraries, but the *Guidelines* may be adapted for use by other interested libraries. Use of the *Guidelines* and compliance with them is voluntary. They provide a self-regulated process, designed to analyze the state of development of a public library and enable it to devise its own strategies for improvement.

Accreditation

A further voluntary step in this self-regulated process enables a public library to submit its services to an external assessment and seek accreditation by its peers. Although the *Guidelines* can remain a purely local tool, particular to each community, their value increases in a provincial context. The opportunity for a library to measure itself successfully against a set of objective, widely accepted guidelines strengthens the individual library and the public library service of the province as a whole.

Ontario Public Library Guidelines Monitoring and Accreditation Council

The Ontario Public Library Guidelines Monitoring and Accreditation Council was established by the Ontario Public Libraries Strategic Directions Council. Since the dissolution of the SDC, the Guidelines Council reports to the Federation of Ontario

Public Libraries. In order to maximize public library ownership and to maintain a high degree of objectivity, Council members represent a broad cross section of public library types and organisations.

The Grand Valley Public Library went through the accreditation process once again in 2004 and was pleased to be reaccredited in January 2005. I would highly recommend the process to any small public library. The accreditation process helps in the evaluation of services and provides direction for future planning and library development. Funding bodies appreciate the fact that the Library is an accredited, well organized and efficiently run facility.
Shann Leighton, Grand Valley Public Library

I wanted to express to you how valuable I believe this document is for the library community and thank everyone for their contributions to this project. As a result, we now have a complete set of policies, have expanded staff training, and have determined the need for a strategic plan. We are well on our way to fulfilling minimum requirements with only 12 guidelines unmet, only one of them mandatory. This has been a very productive process for the Board and myself. There was a determination previously to improve library services but it was the OPLG that gave us the definition of how we could best do this.
Janine Harris-Wheatley, Essa Public Library

The purpose of the Ontario Public Library Guidelines Monitoring and Accreditation Council is threefold:

1. To monitor the continuing effectiveness of the Guidelines and make revisions as required;
2. To arrange for peer audits of those public libraries which so request;
3. To bestow the special designation of "Accredited Ontario Public Library" upon those public libraries that successfully complete the Guidelines accreditation process.

Support mechanisms

For those libraries which do not immediately meet all the requirements of the *Guidelines*, an important part of the process will consist of identifying support mechanisms which will help the necessary development take place.

Some of these support mechanisms currently exist in the form of resource materials such as the *Sourcebook for Small Public Libraries*, the *Library Trustee Development Programme* materials, the *Guidelines for Rural/Urban Public Library Systems*, the OLS on-line *Clearinghouse*, as well as various manuals, samples and kits. (See Appendix A.)

In addition to resources, the need for training and development has been highlighted in the *Guidelines* process, as well as the need for practical services such as consultation and assistance in planning and policy development. Some services in this area already exist. For instance the Ontario Library Service agencies already provide consulting services and administer the Excel training program. A variety of training opportunities are provided by the Ontario Library Service agencies and the Ontario Library Association, as well as the schools of library and information science and library and information technology. The *Guidelines* process should provide a focus for public library training and development activities in the province and ensure that they concentrate on the expressed needs of the library community.

Achieving accreditation the first time gave us a solid basis for future planning and a framework for our successful re-accreditation audit in 2007. We have demonstrated to city council and to our community that we are dedicated to excellence in every aspect of library service. I recommend the accreditation process to all libraries. *Margaret Williams, Brockville Public Library*

II. How the Guidelines may be used

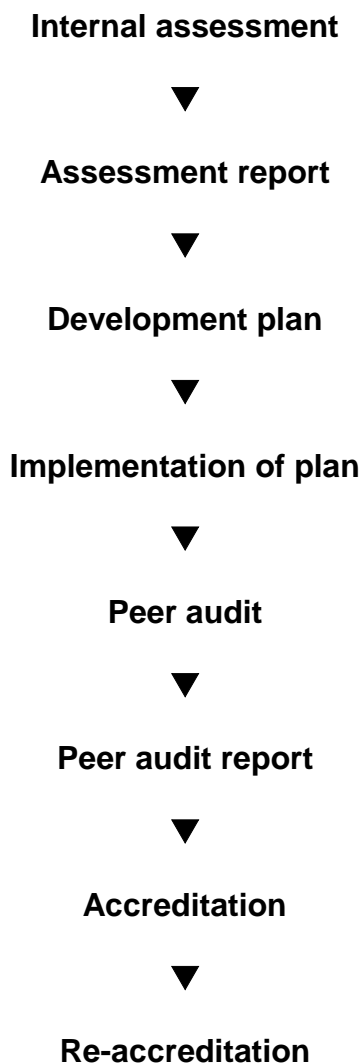
A. Application of Guidelines

Application of the *Guidelines* is voluntary. They may be used either for internal purposes only, or with the involvement of external resource persons in a process that may lead to the library being accredited.

For example, a library's administration or board may use the *Guidelines*, in whole or in part, purely for internal analysis, with a view to considering some or all aspects of the library's services or methods for change or upgrading. The *Guidelines* may also be used in preparation for an external review.

B. The Guidelines Process

The full *Guidelines* process consists of the following steps. Depending on whether or not a library is using the *Guidelines* for the purpose of accreditation, or depending on its state of preparedness, the library may wish to involve itself in a process which covers some or all of the following steps.



STEP 1: Internal assessment

A library administration or board that wishes to undertake this process in whole or in part can begin with a preliminary assessment, comparing their library operation with the requirements of the *Guidelines*. This first step may be accomplished in a number of ways, depending on the preferences of the individual library and on the availability of resource persons. For example, the preliminary assessment could be carried out by the library's own staff and/or trustees, or in co-operation with external resource persons, such as a representative of a willing peer library or representative of the OLS. The library's standing with regard to each of the requirements listed in the *Guidelines* document is determined through analysis and review of the library operation.

STEP 2: Assessment Report

A report indicating where the library has met the *Guidelines* and where it has not is produced by those responsible for carrying out the internal assessment.

STEP 3: Development plan

Using the report, the library produces a plan of how and when it intends to meet those *Guidelines* requirements that it currently does not. The library may wish to call upon the assistance of support organizations such as the OLS at this stage. The development plan can be integrated with a library's on-going planning process.

STEP 4: Implementation of plan

The library then implements the development plan, periodically making adjustments to take into account new or unforeseen circumstances. The library may wish to call upon the assistance of support organizations such as the OLS. The library can also make use of appropriate support materials. (See Appendix A.)

STEP 5: Peer Audit

A library which considers that it has met the requirements of the *Guidelines* may elect to arrange for a peer audit. To initiate this process, the library will contact the Ontario Public Library Guidelines Monitoring and Accreditation Council and ask for a peer audit to be arranged. The Council will appoint a peer audit team whose composition is mutually acceptable to the library and the Council. The Council will charge a modest fee to help cover the costs of the audit. The peer audit team will arrange a suitable time with the library and undertake an assessment of the library operation in accordance with the *Guidelines*. Through a process of analysis and review of the library's operation, the peer audit team will determine whether or not the library meets the requirements of the *Guidelines*.

STEP 6: Peer Audit Report

The peer audit team will provide a report of its findings to the library. If the audit team determines that the library has met the requirements of the *Guidelines*, the library can then proceed to the accreditation stage. If the audit team determines that the library has not met the requirements of the *Guidelines*, the audit team will recommend a course of action for improvement.

STEP 7: Accreditation

A library, which has in the opinion of the audit team adequately met the requirements of the *Guidelines*, may submit a copy of the audit team's report to the OPL Guidelines Council. If, in the estimation of the Council, the library has indeed successfully met the *Guidelines* requirements, the library will be recognized as an Accredited Ontario Public Library and will receive a certificate and promotional items identifying it as such. Accreditation will be valid for five years.

STEP 8: Re-accreditation

To maintain its status as an Accredited Ontario Public Library, a library is required to undertake a peer audit every five years. The new audit will take into consideration changes that have occurred in the library's operation, as well as revisions to the *Guidelines*. In addition to attaining the minimum score required for accreditation, the library will be expected to have taken some steps to address any shortcomings raised in the previous peer audit report. If the library successfully meets the requirements of the *Guidelines*, the Council will re-register it as an Accredited Ontario Public Library for an additional five years.

III. Guidelines Checklist

Definition of terms

Public library board

The library's governing body. In addition to public library boards appointed by municipal and county councils, special legislation may allow a particular municipality to appoint a committee of council rather than a board. For the sake of brevity, and unless stated otherwise, all such bodies are hereafter referred to simply as “public library boards”.

Chief executive officer (CEO)

The position which bears overall responsibility for managing the operations of the library and its staff. (Note: The title used by individual libraries may differ, e.g. Chief Librarian, City Librarian, Library Director, Program Director.)

Population served

The total number of residents of the community served by a library, including the residents of communities which contract with that library for service.

Service outlet

A stationary or mobile facility for delivering public library service.

Branch

A stationary service outlet within a library system intended to deliver a range of library services to a designated area of the community.

Mandatory Guideline

A guideline, designated by the symbol **M**, that must be met in order for a library to receive accreditation.

SECTION 1 - Governance/Administration

1.1 Organization of the board

In order to function effectively, a board requires a formal framework, including officers and rules for board meetings. Such a structure provides the board with an organized way to conduct its business.

- | | | |
|--------------|---|----------|
| 1.1.1 | Governing body - The library has a governing body which is constituted in accordance with the provisions of, and operates in conformity with, current Ontario public library legislation. | M |
| 1.1.2 | Officers - The board has elected a Chair and appointed a Secretary, Treasurer and Chief Executive Officer (CEO). | M |
| 1.1.3 | Meetings - The board conducts formally-scheduled, regular meetings at least ten times per year. | M |
| 1.1.4 | Record - The board keeps a written record of the proceedings of its meetings. | M |
| 1.1.5 | Terms of reference - The board has established written terms of reference for its officers and committees (for example: for the chair, CEO, secretary, treasurer, standing and ad hoc committees). | M |
| 1.1.6 | Evaluation of CEO - A formal process is in place for reviewing the performance of the chief executive officer on a regular basis (at least once each year). | M |
| 1.1.7 | Board bylaws - The board has established and adopted written, procedural bylaws which address such issues as: responsibilities of the board, organization of the board, board meetings, board finances, and amendment of bylaws. | M |

1.2 Policy

Policy is the board's most effective tool in ensuring continuity of governance and consistent library service. Policies help to define library programs, provide direction for future action, clarify what the board hopes to accomplish over time, and ensure that the library's philosophy or mission is implemented. Policies should be in written form, approved at a formal board meeting and reviewed (and revised if necessary) at regular intervals.

- | | | |
|--------------|--|----------|
| 1.2.1 | Process - The board develops and formally adopts written policies. NOTE: Specific policy areas are covered in other sections of these guidelines. | M |
| 1.2.2 | Distribution - Up-to-date copies of board policies are available to all board members and employees. | M |
| 1.2.3 | Review - The board has a process in place for regularly reviewing and revising existing policies. | M |

1.3 Planning

Planning ensures that: the library responds to the legitimate needs of the community; continuity of service is maintained regardless of changes in personnel; the library is able to respond effectively to change; community funds are spent in an effective and responsible manner; and the library board and staff share a common understanding of what the library is trying to achieve.

- 1.3.1 Planning policy** - The library board has established and adopted written policy which defines its role and responsibilities with respect to planning. **M**
- 1.3.2 Community analysis** - A range of community-related information with possible implications for library service, including demographic data, is gathered and formally analyzed at least once every four years, and the results used in the planning of library service. (See Appendix D.) **M**
- 1.3.3 Consultation of users** - Library users are consulted regularly concerning library service (e.g. by means of surveys, focus groups, formal and informal interviews, open houses, suggestion box, website, etc.). An analysis of public comments and suggestions is carried out at least once a year and the results used in the planning of library service. (See Appendix D.) **M**
- 1.3.4 Planning document** - The board has developed a formal planning document, which includes such items as: mission statement, service roles, goals and objectives, and action plans.
- 1.3.5 Review of plans** - The board has a process in place for reviewing the library's plans on a regular basis.
- 1.3.6 Report to public** - The board regularly reports to the community on the library's progress in fulfilling its plans (e.g. by distributing an annual report to council and the community).
- 1.3.7 Participation in local planning** - The board participates proactively in local and/or county government planning processes.
- 1.3.8 Performance measurement** - Data is systematically gathered, electronically or otherwise, that provides information about how well the library is meeting its mission, goals and objectives. This information is used in developing, implementing and assessing the library's plan, and in reports to the community, council and government. **M**

1.4 Finances

The board has a responsibility to secure sufficient funds to carry out its plans for library service. Accountable to the local council, the province and the community it represents, the board undertakes to ensure that the allotted funds are spent in a way that best meets the needs of the community and that is in accordance with the planned budget.

- 1.4.1 Budget** - The board, in co-operation with the CEO, prepares and approves an annual operating budget for the library. **M**
- 1.4.2 Financial records** - The board ensures that accurate records of the library's finances are maintained. **M**

1.4.3 Financial reports - The board regularly receives and reviews written financial reports. **M**

1.4.4 Financial reports to government - The board ensures that full and accurate financial and post project reports are submitted in a timely manner to applicable levels of government, or organizations acting on their behalf, for any project, strategic or capital funding received.

1.4.5 Annual Survey of Public Libraries and financial reporting requirements – **M**
The Board ensures that the Annual Survey of Public Libraries, public library operating grant application form and financial reporting requirements are completed and submitted in accordance with provincial government requirements.

1.5 Advocacy

The library board must ensure that the community is aware of the importance of the library and that funding bodies fully understand the important role which the library plays in the community.

1.5.1 Advocacy policy - The library board has established and adopted written policy which defines its role and responsibilities with respect to advocacy. **M**

1.5.2 Informing council - Information about the library's activities, accomplishments and needs is provided by the library to its local council on a regular basis (e.g. by means of a briefing document, monthly report, quarterly report or annual report). **M**

1.5.3 Meetings with council - The board meets at least annually with its local council to review the library's services, plans and achievements.

1.5.4 Participation in community activities - Board members participate regularly in activities aimed at increasing community awareness of the variety and importance of public library services (e.g. through participation in Ontario Library Week and in local celebrations and events).

1.6 Board member Orientation and Information

Formal orientation of new library board members to library services, policies and current issues will help them to participate fully and effectively in the work of the board. On-going provision of information is necessary to keep board members up-to-date and to maintain their effectiveness.

1.6.1 Duties and responsibilities - Board members are provided with written guidelines outlining their duties and responsibilities. **M**

1.6.2 Orientation - The board ensures that a formal orientation program is carried out for all new board members, including, for example: a tour of the library facility and website; an overview of how technology is used in the library and its role in the library's daily operations; an introduction to library staff; an introduction to other board members; a review of the library's planning documents, budget and recent board minutes; a review of duties and responsibilities as required by current public library and other legislation. In addition, all board members are provided with a package of background materials, including, for example: current public library legislation; the

library's current planning document; the library's most recent audited financial statement; the library's current budget; the library's most recent financial report; the most recent provincial *Library board development kit*.

- 1.6.3 Current information** - Board members are kept up-to-date on new developments in library matters (e.g. through membership in OLA/OLBA; through information provided by the CEO and board chair; through regular information sessions at meetings of the board; through participation in OLS meetings and training events).

SECTION 2 - Accessibility

The library's resources and services should be available to all members of the community as possible. Access to services should be structured in a way that maximizes accessibility and convenience to potential users, when they use the library's physical outlet(s) and when they access the library remotely via the Internet.

2.1 Location of service outlet(s)

Public library service outlets should be located for maximum convenience of residents of the community. The outlet should be easily accessible by public transportation where available.

- 2.1.1 Distance** - Persons residing in the community are required to travel less than 30 minutes to reach the nearest stationary or mobile public library service outlet. (For multiple-branch library, use SECTION 6 - *Multiple-branch library systems*, Guideline 6.2.)

2.2 Open hours

In order to provide the best possible access to library service, open hours must be scheduled for the maximum convenience of residents of the community.

- 2.2.1 Public need** - During the last three years the library has assessed how well its open hours match the needs of the community (e.g. the library is open evenings and weekends in addition to regular working hours).

- 2.2.2 Minimum hours** - The library is open to the public at least 20 hours per week. (For multiple-branch library, use SECTION 6 - *Multiple-branch library systems*, Guideline 6.1.) **M**

2.3 Physical access for persons with disabilities

The library should minimize barriers to access for users with physical limitations and disabilities.

- 2.3.1 Accessibility plan** - The library has assessed its physical accessibility, has developed an accessibility plan, by itself or with partners, and has a process in place for keeping the plan up-to-date. The plan addresses the requirements of applicable legislation.
- 2.3.2 Entrance** - A library entrance is wheelchair accessible.
- 2.3.3 Aisles** - Space between book stacks is sufficient for the passage of a wheelchair (i.e. a minimum of 3 feet).

-
- 2.3.4 Clear access** - Access to user areas and library materials is clear and unobstructed.
 - 2.3.5 Washrooms** - The library provides a washroom that is wheelchair-accessible and equipped for users with physical disabilities.
 - 2.3.6 Multiple-floor structures** - Where the public area of the service outlet occupies more than one level, wheelchair access is provided between levels.
 - 2.3.7 Alternative formats** - The library ensures access to its services and resources for users with disabilities by providing materials in alternative formats (e.g. large print publications, talking books, closed-captioned videos).
 - 2.3.8 Assistive technology** - The library ensures access to its services and resources for users with disabilities by providing assistive technology (e.g. magnification devices or software, key boards with raised letters, large screen monitors). Where services and resources are not in place, the library has identified its requirements and has an agreed implementation plan.
 - 2.3.9 Web site** – The library website meets appropriate standards for access by people with a disability (e.g. The Web Accessibility Initiative standards). Where standards are not in place, the library has an agreed plan to implement them.

2.4 Parking

Parking should be adequate for current and projected use.

- 2.4.1** Adequate and convenient parking (including handicapped-accessible parking space) is available at or near the service outlet.

2.5 Access to materials and equipment in the library

Materials in open stacks should be stored at heights appropriate to their primary users. Equipment for accessing electronic materials should be configured to the diverse needs of library users.

- 2.5.1 Shelving for adult collections** – The majority of materials in the adult collection are stored in such a way that the highest shelf is 60 inches or less.
- 2.5.2 Shelving for children’s collections** - The majority of materials in the children’s collection are stored in such a way that the highest shelf is 48 inches or less.
- 2.5.3 Access to electronic collections** – Convenient access to the library equipment (e.g. OPACs) is provided for all, with suitable heights provided for those with disabilities and also for children.

2.6 Access to Technology

The public library is a key provider of free access to the Internet for the community. Access to high-speed Internet is essential for people of all ages who are seeking information, whether they are students, job-seeking, or in need of information about government services, community opportunities, or information about health.

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- 2.6.1 **Internet public access** - The library provides free use of the Internet for access to: the library's catalogue and membership services; its electronic collections and services; for sending and receiving communications through such means as email or social networking sites. (For multiple-branch library, use SECTION 6 - *Multiple-branch library systems*, Guideline 6.6.) **M**

 - 2.6.2 **User authentication** – The library provides convenient access to resources that are restricted to library members only, such as electronic collections or subscription databases. User authentication software minimizes how often the end-user has to enter membership or other authentication data.

 - 2.6.3 **Access to electronic communication** – Library visitors may send and receive online communications from library computers using the tools available on the Internet such as email and social networking sites. **M**

 - 2.6.4 **Making copies** - The library provides convenient means for users to make paper and electronic copies. (For multiple-branch library, use SECTION 6, Guideline 6.14.) **M**

 - 2.6.5 **Public access management** – Where demand for public computer use is high, the library operates a booking system or other time management system to ensure equitable access for all users.

 - 2.6.6 **Training of users** - The library ensures that users have access to training in the basic use of the computers in the library, how to use the public online catalogue and member services, and how to make effective use of web sites and electronic information resources available on the library's computers. **M**

2.7 Remote access to the library through the Internet

- 2.7.1 Remote public access to the catalogue – The library catalogue is accessible and searchable through the World Wide Web. **M**

- 2.7.2 Remote access to membership functions – Library members can access the ILS through the World Wide Web to perform functions, such as viewing their membership and loans record, reserving library resources, accessing the library's electronic resources, and borrowing/downloading items from the electronic collection.

2.8 Service to housebound or institutionalized people

The library should make special provision for members of the community who need or desire public library service but who are unable to travel to the library building.

- 2.8.1 The library provides library materials on an organized and regular basis to residents of the community who are unable to travel to the library (e.g. the housebound, residents of institutions such as prisons and nursing homes).

- 2.8.2 **Remote access to library services** – When developing or reviewing collections and services, the library considers the needs of people (often with disabilities) who are unable to make regular visits to the library, and who rely on remote access to the library through the World Wide Web (e.g. electronic collections; provision of online forms; online and telephone reference services).

2.9 Exterior Signage

The library's exterior signage both identifies the particular function of the building and is the library's most basic form of publicity.

- 2.9.1 Visibility** - Library buildings are clearly identified by exterior signs which are highly visible from the street and in the appropriate language(s).
- 2.9.2 Hours** - Library hours are clearly visible from the exterior of the service outlet.
- 2.9.3 Directional signs** - The library provides signage indicating the presence and location of the public library in the community (e.g. signs on main community thoroughfares).

2.10 Layout of library

How well the library is laid-out will affect how efficiently and conveniently it can be used by public and staff. The layout also communicates a message about how professional and well-organized the library operation is as a whole.

- 2.10.1 Physical layout** - The physical layout of the library is organized in a way that is systematic, easy to navigate, and convenient for users.
- 2.10.2 Interior signage** - Areas of the library, specific services and parts of the collection are clearly identified by professional-looking signs, in language(s) used by major linguistic groups in the community (e.g. the library catalogue, reference service, children's area, public Internet service, periodicals).

2.11 Publicity

It is important that the community be aware of the many programs and services available from its library.

- 2.11.1** Information about library programs, services, rules and hours is made easily available to community residents in print and on the library's web site, in the appropriate language(s) (e.g. through the provision of pamphlets, brochures, linkages from other appropriate web sites such as that of the municipality, bookmarks, and regular articles or advertisements in the local media).

SECTION 3 - Resources

3.1 Staff

In the interests of providing the best service possible to its community, the library board and administration should strive to maintain a staff which is well trained and technologically literate to meet library needs, highly motivated and sufficient in number to meet the demands of the community.

3.1.1 Personnel policy - *In order to operate with fairness and efficiency, all organizations need written personnel management policies*

The library board has established and adopted written personnel management policies which address such issues as: responsibility for personnel issues; the hiring process; hours of work; salaries, wages and benefits; holidays, vacation and leave; performance evaluation; training and development; grievances; resignation and dismissal; retirement; and personnel records. (Such policies may be in the form of a collective agreement.) **M**

3.1.2 Distribution of policy - Every employee of the library has access to a copy of the personnel policy. **M**

3.1.3 Performance evaluation - *Performance evaluation is a formal opportunity for an employee and his or her supervisor to review and evaluate the employee's work performance. It provides an opportunity for frank discussion by both parties concerning job expectations.*

A formal performance evaluation of each employee is carried out at least once a year.

3.1.4 Job descriptions - *Job descriptions are based upon an analysis of the tasks that must be performed in order to deliver library services. Library services change in response to community needs, therefore job descriptions should be reviewed annually and updated as required.*

A written job description has been developed for each position and is reviewed at least once every year (e.g. as part of the performance evaluation process). **M**

3.1.5 Salary scales - A salary scale has been established for each position and is reviewed regularly according to the terms of the library's personnel policies.

3.1.6 Staffing - *The number of staff required by a library is affected by many local factors, including the number of clients to be served, the number of major language groups to be served, the layout of the library building, and the level of library activity in the community. A number of formulas are available for helping to determine a library's staff requirements. (See Appendix B and Appendix D.)*

a) The library has in place a process for regularly assessing the number of staff required to meet community needs (as determined, for example, by such circumstances as level of activity, number of users, and total hours open). Where the existing number of staff has been determined to be inadequate, the library has a plan in place to improve the situation.

b) To meet the administrative, technological, and service management requirements of the library, the library board employs one or more permanent paid staff.

M

[The total number of library staff hours is _____ hrs.]

c) To meet administrative, management and service preparation duties, staff are provided with paid time outside of hours devoted to working with the public.

- 3.1.7 Level of training of CEO** - *Few decisions that a library board makes are more important than selecting the right person to manage the library operations and staff. A CEO who possesses formal library education, appropriate skills and expertise is key to the board achieving its goals and fulfilling its plans.*

Formal library education in Ontario includes the Excel Certificate Program in Managing a Small Public Library, a college diploma program in library techniques and a university graduate degree in library and information science. (Similar or equivalent types of training are provided elsewhere in Canada and the world.) The level of training appropriate for a CEO is related to the library service needs of the particular community and to the degree of complexity of the local library operation. Boards of smaller libraries might find the Excel Certificate to be an appropriate level of training for the CEO, while a higher level of training will be appropriate for larger, more complex libraries.

The CEO has completed formal library education which is appropriate both to the needs of the community and to the complexity of the library operation.

M

- 3.1.8 Continuing education and training** - The library encourages continuing education and training for its staff and makes provision for this in its policy, its long-range plan, and in its budget to an amount not less than 1% of its total wages and benefits (e.g. by providing financial support for staff to enrol in the EXCEL program, or to attend library conferences and other training programs and events, either in person or through e-learning technologies).

3.2 Library Collections

Studying the community's demographic and economic situation, identifying what parts of the community are growing, what activities are most popular, what interests exist, what businesses are present, etc. provide the library with essential information in determining priorities for library service. Overall library priorities are translated into priorities for physical and electronic collection development.

- 3.2.1 Content and size of collection** - The library has a process in place for regularly assessing the content and size of the collection required to meet community needs. (Materials may be owned by the individual library or shared with a group of libraries in a materials pool.) Where the existing content and/or size of the collection have been determined to be inadequate, the library has a plan in place to improve the situation. (See Appendix B and Appendix D.)

[The library currently holds _____ volumes per capita in its collection.]

3.2.2 Collection policy - The library board has established and adopted written policy concerning the library's collection which addresses such issues as: responsibility for collection development and selection; selection criteria; weeding; disposition of gifts; intellectual freedom; complaints about the collection; organization of the collection. **M**

3.2.3 Intellectual Freedom - The library's collection development policy incorporates the concept of Intellectual Freedom, and endorses the Intellectual Freedom statement or manifesto of the Canadian Library Association, the Ontario Library Association, or a statement developed by the library itself.

3.2.4 Collection plan - The library has established a written collection development plan reflecting the library's collection priorities. The plan includes long and short term objectives, as well as a buying plan.

3.2.5 Collection maintenance procedures - Procedures are in place for acquiring and withdrawing materials, and for keeping a record of the number of items entering and leaving the collection.

3.2.6 Formats and languages - The library offers materials in a suitable variety of formats and languages reflecting the community's needs and the need for access for people with disabilities (e.g. books, periodicals, audio recordings, video recordings, materials for the disabled, electronic and on-line products, archival and local history materials, materials in languages reflecting local linguistic groups). (See Appendix D.)

3.2.7 Acquisitions - *The library collection is a dynamic resource which requires a constant inflow of new material and outflow of old material to maintain its relevance to the community and an acceptable level of accuracy.*

On an annual basis, the library adds new materials to its collection at a rate and in formats that are sufficient to maintain a reasonable level of currency, accuracy and accessibility. (See Appendix B.)

3.2.8 Withdrawals - A regular and on-going program of removing unreliable, out-of-date, and worn out items is carried out to: maintain the accuracy, currency and relevance of the contents of the collection; and to control the overall size of the collection and the amount of library space it occupies.

3.2.9 Collection use - *The degree to which a library's collection successfully meets the needs of the local community is reflected in the amount of use the collection receives.*

The library has in place methods that accurately measure collection use, methods that keep track of the number of items borrowed or accessed/downloaded by users (i.e. circulations) and of the number of items used on library premises (i.e. in-library uses) and incorporates this information into its planning process.

A measure that is frequently used to compare the effectiveness of library collections is the number of circulations per capita of the community served.
(See Appendix B.)

[The library's annual rate of circulations per capita is _____.]

3.3 Access to Information

Information is only useful to the extent that it can be located and retrieved. The more effective and convenient the access provided by the library to its various information resources, the more useful that information becomes to the library's community. Well-trained staff members are essential for training and assisting users in how to successfully access the information they require.

- 3.3.1 Online public access catalogue** - The library provides access to the items and information in its collection by means of an online public access catalogue (OPAC) containing MARC-compatible records or the equivalent. The library catalogue is accessible and searchable through the World Wide Web.
- 3.3.2 Maintenance of catalogue** - The accuracy, currency and relevance of the contents of the catalogue are maintained through a regular and on-going program of adding new records and removing records relating to materials that have been permanently withdrawn from the collection.
- 3.3.3 Inventory** - An inventory of the library's collection, ensuring that the catalogue accurately reflects the contents of the collection, is carried out on a regular basis and is completed at least once every three years.
- 3.3.4 Labelling** - Items in the collection are labelled in a way that is consistent and facilitates ease of access by the public and staff (e.g. with labelling that indicates: the location of the item on the shelf, including classification code; target audience - adult, young adult, juvenile, pre-reader; in the case of fiction, genre; format - large print; and language).
- 3.3.5 Arrangement** - Items in the physical collection are arranged in a logical and well ordered sequence, allowing for convenient browsing and quick retrieval by the public and staff.
- 3.3.6 Electronic information resources** - The library provides free access in the library to at least one current electronic information resource (e.g. *Canadian Encyclopedia*), and promotes this service (e.g. through appropriate signage, brochures, the library's web site, etc.)
- 3.3.7 Links to World Wide Web-based information sources** - The library provides access to selected, evaluated and organized links to reliable and current information sources available on the Web (e.g. to other community organizations, online directories, employment resources, genealogy resources, government information, Internet guides, search engines, health resources, etc.)

3.4 Facilities

The library board should strive to provide a physical setting for library service that is inviting to the public and that provides adequate space to store and display the library's physical collection, adequate space for the library staff to carry out their duties in an efficient and comfortable setting, and adequate space for the public to make proper and convenient use of the library's equipment, resources and services. Library facilities should have a technology infrastructure that enables staff to carry out their duties efficiently and enables library users to access the library's technology-based services and collections with ease. For guidelines which address the issue of access for users with disabilities, see Section 2.3.

- 3.4.1 Space** - *The amount of space required by a public library depends on the unique needs of the individual community. A number of methods are available to assist libraries in determining their space requirements. (See Appendix B and Appendix D.)*

The library has undertaken a planning process which has examined the library's space and technology requirements in light of local needs. Where the existing space has been determined to be inadequate, the library has a plan in place to improve the situation.

- 3.4.2 Areas of the library** - Distinct areas of the library are designated for various services and functions (e.g. adult services, children's services, library staff work and rest, storage, etc.). Where areas are designated for specific user groups (e.g. children, teens), equipment and infrastructure compatibilities are taken into account (e.g. internet access, computer stations).
- 3.4.3 Public use areas** - As determined by local needs, the library space is arranged to provide room for activities such as: study (e.g. for tables and/or carrels in a quiet part of the library); informal reading (e.g. for comfortable chairs located near the periodicals collection); public use of library equipment (e.g. listening and viewing centres and computing facilities); use of personal equipment by the public (e.g. laptops); community and cultural activities.
- 3.4.4 Temperature** - The library provides temperature control for the comfort of the public and staff and for the protection of assets.
- 3.4.5 Interior lighting** - Lighting levels are adequate in all areas (e.g. in book stack areas, general reading and staff areas, computer stations, reading tables and carrels). (See Appendix B.)
- 3.4.6 Shelving capacity** - The amount of shelving is sufficient to store and display most materials without overcrowding.
- 3.4.7 Public washrooms** - Conveniently located washrooms are provided for public use.
- 3.4.8 User Space (Seating)** - *Provision must be made for the use of library services and materials by the public on library premises.*

The library provides adequate seating for leisure reading, as well as table space and/or carrels for study purposes and consultation of library materials. (See Appendix B.)

[The library's current user capacity is _____ user spaces.]

3.4.9 Furniture - The library provides furniture that is appropriate for the target user (e.g. child sized tables and chairs are provided in the children's area).

3.4.10 Return of materials - Provision has been made for the return of library materials when the library is closed.

3.5 Safety, Security and Emergencies

The library board is responsible for providing a safe and secure environment for library staff as they carry out their duties and for members of the public who use the library. The library board is also responsible for safeguarding any personal information that it collects and uses.

3.5.1 Policy - The library has in place policies and procedures to deal with privacy and access to information, safety, security and emergency issues (such as: members of the public who pose a real or potential threat to the safety and well-being of other users and/or library staff; animals other than service animals; use of roller blades, etc; blocking of aisles, doorways and stairways; weapons. ; inappropriate use of the Internet; unauthorized access to restricted data.)

3.5.2 Emergency procedures - The library has written emergency procedures and has a process in place to ensure that staff are trained in implementing them (e.g. health emergencies; evacuation plan; bomb threats; evacuation procedures to assist people with disabilities).

3.5.3 Emergency facilities - The library provides emergency facilities appropriate for the size of the library (e.g. smoke and fire alarms; emergency lighting; evacuation routes; fire extinguishers; emergency first aid supplies).

3.5.4 Supervision - All areas of the library open to the public are supervised by library staff, with clear lines of sight maintained between staff work areas and public areas.

3.5.5 Working alone - If and when staff are required to work alone in the library, the board has developed policies and procedures to help ensure staff security and safety (e.g. with respect to opening and closing the library, emergency situations, limits on potentially hazardous work).

3.5.6 Exterior lighting - The library entrance and parking area are clearly illuminated at night.

3.5.7 Privacy and Access to Information – The library has procedures in place for the collection, access, use and disposal of personal data, including images of individuals. Staff are trained in implementing privacy and access to information law (E.g. who may view information about library users, personnel records etc., and under what circumstances). **M**

SECTION 4 - Services

4.1 Lending of library materials

Public libraries are by tradition lending institutions. That is, library members are encouraged to borrow materials and are given responsibility for the care of those materials for a set period of time, after which the materials must be returned to be made available to other users. In order that access to materials for loan is convenient and fair for all users, and to control the flow of physical materials in and out of the library, a well thought-out and organized process must be in place.

- 4.1.1 Lending collection** - The library makes available to the public a physical collection of books and other library materials which may be borrowed by registered members for a specified period of time. **M**
- 4.1.2 Online collection** - The library makes available to the public an online collection of books and other materials which may be borrowed/downloaded by registered members for a specified period of time.
- 4.1.3 Circulation policy** - The library board has established and adopted policy governing the circulation of library materials which addresses such issues as: who may borrow materials; what may be borrowed; loan periods; overdue loans and penalties; renewal of loans; reserving of loans; lost or damaged materials; and circulation records. **M**
- 4.1.4 Reserves** - The library offers a “reserve” service, whereby library members may request to be notified of the availability of materials which are on loan to other members or are in the process of being prepared for public use.

4.2 Reference and information service

Reference and information service involves a process by which trained library staff endeavour to satisfy the information needs of library users by accurately identifying the information required and then either guiding the user to the most appropriate information source or providing the information itself.

- 4.2.1 Reference and information service** - The library has in place trained staff (i.e. staff who meet the training requirements outlined in Guideline 3.1.7 or who have been trained by a person meeting those requirements) to provide answers to queries and requests for information posed by library users. **M**
- 4.2.2 Reference and information policy** - The library board has established and adopted policy governing the provision of reference and information service, which addresses such issues as: which members of the staff are responsible for providing reference and information service; limits to assistance provided; how telephone, fax, online, email and other electronic requests are handled; which types of questions staff will not attempt to answer; timeliness and accuracy of responses; how the reference collection is maintained and by whom; how unanswered questions are dealt with; when users are referred to other agencies; and what statistics and other records are kept. **M**
- 4.2.3 Reference resources** - The library provides materials dedicated to information retrieval by library users and staff, in the appropriate language(s), and containing 'core' types of materials as specified in Appendix C. **M**
- 4.2.4 Remote requests** - The library accepts requests for information by telephone and fax, and by online, email and other electronic means.

-
- 4.2.5 Monitoring of service** - The library has in place procedures for accurately recording and measuring the number and types of requests for information that are made (in person, by telephone and fax, and by online, email and other electronic means) as well as which requests have or have not been answered satisfactorily. This information is incorporated into the library's planning process.

4.3 Readers' advisory service

Readers' advisory service is the process of matching users with materials, and materials with users. It answers questions that have more to do with users' leisure needs than with their information needs.

- 4.3.1 Guidance and assistance** - The library staff provides guidance and assistance to library users as to which library materials will most suit their needs (e.g. by identifying the author of books featuring a certain character; determining the order of a series; directing library users to materials about a certain time period or in a particular genre, or to biographies about a certain person). **M**
- 4.3.2 Advisory aids** - For the convenience and guidance of adult, young adult and juvenile users, and in the language(s) appropriate to the community, the library promotes fiction and other creative works by individual authors and creators, or on themes which it believes will be of particular or current interest (e.g. through the use of materials lists, book-talks, special displays, web content, databases, etc.).

4.4 Children's services

'Children's services' involve services to library users who are infants, pre-schoolers and school aged children up to about grade six or seven. Children require services that are designed especially for them because of their different levels of intellectual, emotional and physical development.

- 4.4.1 Children's services policy** - The library board has established and adopted policy governing the provision of children's services, which deals with such issues as: supervision; access to the adult collection; the library's relationship with local schools (e.g. curriculum support); an endorsement of OLA's *Children's Rights in the Public Library* statement. **M**
- 4.4.2 Children's collection** - The library provides a collection of library materials which is designated primarily for use by children. **M**
- 4.4.3 Computer literacy** – The library provides access to software applications that introduce children to technology skills.
- 4.4.4 Reference and readers' advisory service** - Library staff working with children provide reference and readers' advisory services appropriate to the age levels of these users. **M**

4.5 Young adult services

'Young adult services' involve library users ranging in age from twelve to eighteen years. Young adults require library services that will assist them in their transition from childhood to adulthood.

- 4.5.1 Young adults' collection** - The library provides a collection of materials which is designated primarily for use by young adults and designed to appeal to the changing reading levels, interests and information needs of this group.
- 4.5.2 Computer and electronic resources** – The library provides a range of equipment and/or software applications that reflect young adults' interests, enthusiasms and needs (e.g. online games, music, social networking, and educational needs).
- 4.5.3 Reference and Readers' advisory service** - Library staff working with young adults provide reference and readers' advisory services appropriate to the various age levels of these users.

4.6 Services to linguistic, cultural and immigrant groups and people

Given the growing diversity in the demographic makeup of many Ontario communities, public libraries should plan to develop resources and implement programs to meet the unique library needs of local linguistic, cultural and immigrant groups.

- 4.6.1 Community need** - The library has determined what needs exist for the provision of library services to linguistic and cultural groups and people (e.g. francophone and First Nation citizens), as well as immigrants in the community. Where there is a demonstrated need, the library board has established and adopted policy governing the provision of services to these groups and offers services as appropriate, either on its own or in conjunction with other local organizations.
- 4.6.2 Collections** - Where appropriate, the library provides a collection of library materials which is designated primarily for use by linguistic, cultural and immigrant groups within the community.
- 4.6.3 Reference and readers' advisory service** - Library staff working with linguistic, cultural and immigrant groups within the community provide reference and readers' advisory services appropriate to these users.

4.7 Programming

Programming refers to recreational, educational or cultural group events or activities sponsored by the library. Programs may be aimed at children, young adults, adults, or a combination of age groups. They can take place in the library, and/or in the community, and/or online. They can be on-going, in a series, or one-time events. Programs are used to provide information, increase awareness and promote use of the library's services.

- 4.7.1 Community need** - The library has determined what community needs exist for what types of programs, in what format (on site, in the community, and/or online) and for which age levels. (For example, programming is an integral part of most children's services and is used to promote lifelong use of libraries, to stimulate a love of literature and reading, and to impart important information and skills.). Where there is a demonstrated need, the library offers programs to the community as appropriate, either alone or in conjunction with other local organizations (e.g. story hour for pre-schoolers;

reading clubs; social networking activities, lectures; demonstrations; author readings). (See Appendix D.)

4.7.2 Programming policy - The library has established and adopted policies and/or procedures which address such issues as: what types of programs are to be provided to what parts of the community; who is responsible for developing and running programs; whether charges should be made for participating in programs.

4.7.3 Formal process - The library follows a formal process for planning, preparing and evaluating library programs. Attendance statistics are recorded, along with the number and types of programs provided. (e.g. literacy programs, computer training programs, children's programs, teen programs, etc.).

4.7.4 Public schedule - The library has prepared and made available to the public a schedule of up-coming programs in print and on the library web site.

4.8 Community Information

The public library may have an important role to play as a source of general information about community organizations and events.

4.8.1 Community need - The library has determined what community needs exist for providing general information about the community. Where there is a demonstrated need, the library provides an online and/or printed community information service as appropriate, either alone or in conjunction with other local organizations and events. (See Appendix D.)

4.8.2 Community information policy - The library has established and adopted policies and/or procedures which address such issues as: what types of community information are to be provided; how this information will be kept current; how it will be made available (e.g. in print or online).

4.9 Local history

Every community has a responsibility to collect and preserve materials which have a special relevance to its unique history. The public library may have an important role to play in making this information available to the community.

4.9.1 Community need - The library has determined what community needs exist for a local history resource. Where there is a demonstrated need, the library provides a local history service as appropriate, either on its own or in conjunction with other local organizations. (See Appendix D.)

4.9.2 Local history policy - The library has established and adopted policies and/or procedures which address such issues as: what types of local history materials are to be collected; whether resources related to local genealogy are to be provided; what geographic area is to be covered; preservation of the materials; public use of the materials.

4.9.3 Preservation – The library is aware of the level of need in its community for digitizing local history materials. Where there is a need, the library is actively pursuing digitization goals, e.g. participating in digital partnership, applying for funding, developing a plan.

4.10 Community space

Providing space on library premises for public meetings and gatherings is a form of service offered by many libraries. Technology enables staff and communities to participate in meetings, learning and events remotely (e.g. electronic town halls or conferences, webinars and conference calls, public celebrations).

- 4.10.1 Public meeting room policy** - If the library makes a public meeting room available, the library has established and adopted policies and /or procedures which address such issues as: who is eligible to use the facility; the rules and regulations; the respective responsibilities of the users and the library; fees, if any; booking; cleanup; liability.
- 4.10.2 Equipment** – The library provides appropriate equipment and services to support a variety of meeting room uses, such as Internet and telephone access and presentation technology.

SECTION 5 - Co-operation and Partnerships

5.1 Resource Sharing

As each library collection is unique, and as no single collection can satisfy all the needs of all its users, public libraries can greatly enhance their service by sharing materials. The act of sharing advances the principle of equity of access by mitigating regional disparities in library service.

- 5.1.1 Interlibrary loan service** - When a user's information needs cannot be met by the local library's own collections and information resources, the library provides a service to its users of borrowing materials from other libraries (i.e. Interlibrary loan service). The library provides access to the collections of other libraries through the province-wide resource-sharing system, INFO and promotes this service (e.g. through appropriate signage, brochures, information on the library web site etc.). **M**
- 5.1.2 Participation in INFO** - The library has made all or part of its physical collection available for loan to other libraries through participation in the Information Network for Ontario (INFO). The library may also participate in a local network of information providers (e.g. including local schools, colleges and universities).
- 5.1.3 Resource sharing policy** - The library board has established and adopted policies which address such issues as: lending of materials to other libraries; the type of materials it is prepared to lend or not lend; the length of time for which materials will be lent; when it will request materials from other libraries; method of shipment; lost or damaged materials. **M**
- 5.1.4 Technology-related cooperation** – *Technology-related goals which are out of the reach of individual libraries alone have been shown to be achievable through partnership and cooperation between individual libraries. Examples include: the Ontario Library Consortium and JASI, which each enable small libraries to automate their processes as part of an integrated library system partnership; the Virtual Reference Library/La Bibliotheque de reference virtuelle which create public databases of authoritative Web resources. Other Ontario projects have demonstrated that diverse technology projects can become cost-effective through partnership (e.g. shared technical support, consortium licensing of reference databases).*

To strengthen and enhance service to its users, the library participates with organizations beyond its own community that enhance its ability to deliver technology-related services to the community, to provide technology training for its staff, or to enhance the library's efficiency in service delivery, library promotion, programming, administration, and communications

5.2 Links with other organizations and individuals

The benefits of co-operation with other organizations include less duplication of service, a combining of resources for maximum effect, and an overall improvement in community services. Volunteers may in some cases be of great assistance in helping the library carry out special tasks or projects (e.g. fundraising).

- 5.2.1 Community Partnerships** - The library has established partnerships with other organizations in the community in order to coordinate resources and actions, thereby jointly improving service to the community (e.g. with schools, literacy programs, chambers of commerce, heritage groups, government offices, public Internet access organizations and advocate groups).
- 5.2.2 Broad-based Partnerships** - To strengthen and enhance service to its users, the library participates with organizations beyond its own community; for example, by being an active member in regional, co-operative organizations (e.g. the Federation of Ontario Public Libraries, the Ontario Library Consortium, the Information Network for Ontario), by taking advantage of provincial and federal funding programs and opportunities, and by participating in Ontario Library Service and Ontario Library Association committees.
- 5.2.3 Volunteers Policy** - Where a library uses volunteer help from individuals in the community, the library board has established and adopted policies which address such issues as: types of tasks to be performed, enlistment of volunteers, retention of volunteers, how volunteers fit into the overall operation of the library.

SECTION 6 - Multiple-branch library systems

For greater public accessibility and convenience, library systems in large geographic areas may deliver their services through several branch libraries. The hours and services offered in each of these branch libraries should be based on the needs and characteristics of the local community it is meant to serve. In most multiple-branch systems, planning and policy development is done centrally. It is at the local branch library, however, that most service to the public takes place.

- 6.1 Minimum hours open** - Residents of the community are served by a branch library that is open to the public at least twelve hours per week. **M**
- 6.2 Distance** - Residents of the community served by the library system are within a forty-five minute drive of a branch library.
- 6.3 Service level** - The library board has a process in place for determining the appropriate level of service for each branch (e.g. number of hours open, types of materials, electronic infrastructure, types of services).
- 6.4 Staffing level** - The library board has a process in place for determining the appropriate level of staffing for each branch. (See Appendix B.)

-
- 6.5 Internet connectivity** – The library is connected to the Internet with a minimum bandwidth of 1 Mbps download speed. If this is not available, the library is connected to the Internet with the best speed/bandwidth available in the community. **M**
- 6.6 Internet public access** - The library provides free use of the Internet for access to: the library’s catalogue and membership services; its electronic collections and services; for sending and receiving communications through such means as email or social networking sites. **M**
- 6.7 Integrated library system (ILS)** – Each branch’s collections are networked with the ILS, and branch circulation is automated. The OPAC is available for staff and library users to consult. Where a branch isn’t networked with the ILS, a plan is in place to bring it online. **M**
- 6.8 Collection development** - The library system co-ordinates collection development and acquisitions for its branches.
- 6.9 Access to collection** - Each branch has access to the collection of the entire system through the online public access catalogue. The OPAC may be accessed either through an OPAC workstation or through the library’s website, and accessible on the Internet. **M**
- 6.10 Resource sharing** - An effective system of sharing and exchanging materials among branches is in place, including a formal system of inter-branch loans. **M**
- 6.11 Reference and information service** - Reference and information service is available in each branch as appropriate to the particular library system and according to its particular policy. In addition, branch users have access to an adequate and well-staffed reference and information service beyond the local branch.
- 6.12 Staff technology access** - Staff have one or more computer workstations to access the ILS, the Internet, email, word-processing and other necessary software and, where relevant, the intranet. **M**
- 6.13 Telephone** - Each branch has at least one line dedicated to telephone use, with a number listed under the branch’s name. **M**
- 6.14 Making copies** - The library provides convenient means to make paper or electronic copies. **M**

SECTION 7 – Use of Technology

Public libraries need technology infrastructure and equipment suitable to the various tasks they perform, whether the task is to provide a direct service to the community (such as access to the library's collections or to resources available on the Internet), or to support the core functions of the library such as maintaining the collections, checking loans in and out, and communicating with users, colleagues and suppliers.

7.1 Technology policy, planning and administration

Managing technology and its uses is complex, and affects the entire organization. Many aspects of technology use are governed by legislation, codes of practice, and local policy decisions. It is therefore essential that the library has a clear policy framework governing technology and its use.

7.1.1 Technology policy – The board has a written policy or policies which address various aspects of technology use by the library. e.g. public access and use of the library's computers and Internet; acceptable use of the library's computer equipment, software and networks; filtering software; privacy and access to personal information; and provision of assistive technology for people with disabilities. The policies are in line with current issues in technology used by the library and are compliant with applicable legislation (e.g. copyright). Elements of the library's technology policies may be part of a municipal policy adopted by the board. **M**

7.1.2 The board may also have written policies on other technology related matters as relevant, e.g. staff assistance in the use of technology, the use of personal technology equipment in the library.

7.1.3 Technology plan – *To continue to perform effectively over time, technology infrastructure must be maintained, upgraded and replaced. This can require a considerable investment in various kinds of electronic equipment, as well as in connectivity, computer networks and other infrastructure. This has significant financial and service-related consequences for the library and should be planned for.* **M**

The library has in place a plan for acquiring, servicing, upgrading and replacing electronic networks, equipment and software applications. The plan considers the library's existing technology, technology potential, and future trends. It includes strategies for funding, staffing, training, and technology support.

7.1.4 Technology budget – Stable funding for IT replacement and upgrading, and for IT staff support, is essential for successful delivery of library services. The library makes provisions in its budget for a regular/ongoing schedule of servicing and replacement of equipment and software, and for other elements of its technology plan. **M**

7.1.5 Business continuity and disaster plan - The library has considered and prepared for local interruptions to technology-based services (such as power outages or technical issues) as well as major disruptions or failures (such as grid failures or fire damage). The plan establishes how the library will maintain essential services during short-term or limited interruptions to service (e.g. the ILS goes down), and for recovering data in the event of short-term or catastrophic failure. It includes communicating the plan to staff, and training them in its implementation. The business continuity and disaster plan may be part of the overall library or municipal continuity and disaster plan.

-
- 7.1.6 **Security** – The library takes appropriate measures for protecting computer equipment, networks, applications and data from theft, corruption and unauthorized access. This includes data backup practices, access protocols to data, and the presence of up-to-date firewalls and virus protection. **M**

 - 7.1.7 **Performance indicators and statistics** – The library makes use of technological capabilities (such as ILS reports and web site analytics) for collecting statistics to facilitate various aspects of library planning (such as collection development, open hours and staffing), and completion of the Annual Survey of Public Libraries.

7.2 Communication and Computer Networks

Public services can only be efficiently provided if they are integrated with electronic communication networks such as phone, email, the Internet, and other networks.

- 7.2.1 **Telephone** – The library has at least one line dedicated to telephone use, with a number listed under the library’s name. (For multiple-branch library, use SECTION 6 - *Multiple-branch library systems*, Guideline 6.13) **M**

- 7.2.2 **Fax** - The library is equipped to send and receive documents either by fax or other electronic means.

- 7.2.3 **Internet connectivity** – The library is connected to the Internet with a minimum bandwidth of 1Mbps download speed. If this is not available, the library is connected to the Internet with the best speed/bandwidth available in the community. (For multiple-branch library, use SECTION 6 - *Multiple-branch library systems*, Guideline 6.5) **M**

- 7.2.4 **Networks** – Stable local and wide area networks (LANs and WANs) and wireless networks are in place which meet the technology plan’s requirements for serving the library’s needs. If the networks aren’t in place, the plan addresses how they will be achieved.

- 7.2.5 **Local Area Networks (LANs)** – The library has a LAN linking equipment and functions appropriately (e.g. a LAN that links public access computers to a printer, or that enables several computers to access network-based software). **M**

- 7.2.6 **E-mail** – Staff have access to a library (or municipal) e-mail system. **M**

- 7.2.7 The library has a policy or protocols about which staff and volunteers have individual access, group access or departmental access.

7.3 Computer Equipment

- 7.3.1 **Inventory** – The library has an up-to-date inventory of its technology equipment and software licences, and has a schedule for inventory-taking and updating, at minimum once a year.

- 7.3.2 **Networked workstations and peripherals for public use** – the library has defined the adequate number of networked workstations and peripherals (e.g. printers, printer servers) for public use, and has either the number required or has a plan in place for pursuing the designated number. **M**

7.3.3 Networked workstations and peripherals for staff use – The library has defined what an adequate number of networked workstations and peripherals is for staff use, to ensure that their responsibilities can be carried out to the required standards. This will include workstations for reference and circulation duties, technical services, and office/administrative duties. (For multiple-branch library, use SECTION 6 - *Multiple-branch library systems*, Guideline 6.12) **M**

7.3.4 Wireless networks – Where appropriate, the library has installed wireless networks for public and staff access.

7.3.5 Additional computer requirements – *An increasing variety of computer devices are available for use in different circumstances, such as personal digital assistants (BlackBerry etc.), tablet computers, e-readers, and laptops.*

The library has established its approach to assessing its needs for new or specialized computer devices, and has protocols in its technology plan for including such needs.

7.4 Library software

Library software, such as an integrated library system, enables a library efficiently to carry out essential and often complex processes related to administering resources and making them available to the public.

7.4.1 Integrated library system (ILS) The library either operates or is a participant in an ILS which has, as a minimum, cataloguing and circulation modules, and a web-based catalogue. (For multiple-branch library, use SECTION 6 - *Multiple-branch library systems*, Guideline 6.7) **M**

7.4.2 ILS modules and platforms – The library’s ILS has a range of modules and add-ons that support library efficiency and user convenience, such as acquisition of materials, automated notification of holds and overdue loans, federated searching, or discovery platforms.

7.4.3 ILS Records - The library has in place procedures and schedules for purging outdated records such as missing materials, and members who have been inactive for two years or more.
(An ‘active’ member is one who has used his or her borrower’s identification to borrow an item from the library’s collection or to access a library service, including an online service provided by or through the library.)

7.4.4 Software applications for public service functions – *The library has an important role in the community providing public access to computers, and as such may provide facilities for word-processing and other community use of computers, as well as access to core library services (e.g. catalogue, Internet access).*

The library has office and other software applications available for public access according to the established needs of the community. The library has either the applications required, or has a plan in place for obtaining the appropriate software.

7.4.5 Office software applications for staff use – The library has office or web applications for staff use such as e-mail, word-processing and spreadsheets. It may have additional applications that contribute to the library’s administrative efficiency e.g. financial software, desktop publishing software, training software. (For multiple-branch library, use SECTION 6 - *Multiple-branch library systems*, **M**

Guideline 6.12.)

7.5 Library web sites and web-based services

The World Wide Web is an essential channel through which an organization delivers services, publicizes its presence, and interacts with its community. A dynamic, well-planned and up-to-date web presence extends the library's reach in the community, offers additional services, and may be the primary form of access to the library for people with restricted mobility.

7.5.1 The library web site - The library has its own web site, or has web pages within the municipality's web site. The web site has been designed according to a clear plan which follows appropriate web protocols and/or standards such as design and usability standards, metadata standards etc. Criteria for updating content and responding to problems are in place (e.g. turnaround times, percent of staff hours allocated to library needs). Web site visitors can navigate easily to the information or function they require. **M**

Where the library's web site is part of the municipality's web site, an agreement is in place that ensures that the library pages are conveniently signposted from the site's landing page, and that they meet the Ontario Public Library Guidelines for library web sites and web-based services.

7.5.2 Library information – The Web site includes up-to-date information about the library, e.g. library services, locations, programs, hours, telephone/fax/email, membership, board information, contact information, and policies relevant to public library use. **M**

7.5.3 Catalogue – the catalogue is available at all times on the library's web site, except posted scheduled maintenance periods. **M**

7.5.4 Integrated library system – the ILS is available at all times on the library's web site (except posted scheduled maintenance periods). Web site visitors can check the catalogue. Members can check their membership record, renew loans, reserve materials and, where available, download electronic materials.

7.5.5 Library collections – The web site has up-to-date information about the library's collections and how to use them. It may have information such as reading and research guides, guides to media and electronic materials etc. to assist visitors choosing materials. **M**

7.5.6 Reference and information services – The web site provides access to at least one current electronic information resource (e.g. *Canadian Encyclopedia*, *Canadian News Stand*, *EBSCOhost*., *NetLibrary*, *NoveList*), and promotes this service. **M**

7.5.7 Online reference and information inquiries – Through the web site, visitors can email staff or initiate live chat to access the library's reference services. The web site lists the times the online chat service is available, and the timeframe for responding to emails. **M**

7.5.8 Web sites for specific user groups – The library has sections of the web site, or additional web sites for one or more specific user groups such as children, teens, and significant cultural or linguistic populations in the community. They are well sign-posted from the library landing page.

7.5.9 Interactive services - *The World Wide Web and the Internet are in a continual state of evolution. Mobile technologies, “Web 2.0” and “Web 3.0” expand the potential for using technology to deliver services and communicate with library users and the wider community.*

The library has addressed social media and/or mobile technology in its various planning processes. It uses these technologies to enhance its relationships with library users and the community.

7.6 Staffing for information technology

7.6.1 Staff training in technology use - Library staff receive training in how to use library equipment and software applications to carry out their responsibilities efficiently. They are trained to assist the public in how to use equipment and applications intended for public use, as established in library policy. They receive training in basic computer troubleshooting, and procedures for assessing and reporting technology problems. Staff receive training in implementing technology policies and related procedures (e.g. privacy and access to information; business continuity). **M**

7.6.2 Technology expertise – The library has access to skills which support planning, purchasing, configuring and upgrading technology. E.g. advice from municipal IT department or purchasing department; OLS input.

7.6.3 Technical support – *computer equipment, software and networks are complex, and skilled technicians are required to install them, maintain their performance, and repair faults in a timely fashion.*

The library has access to staff that can provide skilled technical support for installing, maintaining and repairing library technology. The library has identified its requirements for technical support in terms of skill levels, knowledge of library technology, availability of support and response times. If the library’s technical support doesn’t meet its identified requirements at present, the library has an agreed plan for achieving them.

Appendix A - Support and Resources

Organizations

Ontario Ministry of Culture

400 University Avenue, 4th Floor, Toronto, ON M7A 2R9
Telephone: (416) 314-0199, Fax: (416) 314-7635
Web site: <http://www.culture.gov.on.ca/english/library/index.html>

Ontario Library Association

50 Wellington Street East., Suite 201, Toronto, ON M5E 1C8
Telephone: (416) 363-3388, 1-866-873-9867, Fax: (416) 941-9581
Web site: www.accessola.com

Ontario Library Service-North

334 Regent Street, Sudbury, ON P3C 4E2
Telephone: (705) 675-6467, 1-800-461-6348, Fax: (705) 675-2285
Web site: www.olsn.ca

Southern Ontario Library Service

111 Peter Street, Suite 902, Toronto, ON M5V 2H1
Telephone: (416) 961-1669, 1-800-387-5765, Fax: (416) 961-5122
Web site: www.sols.org

Federation of Ontario Public Libraries

5120 Yonge Street, Toronto ON M2N 5N9
Telephone: (416) 395-5638, Fax: (416) 395-0743
Web site: www.fopl.ca

Programs

EXCEL: a certificate programme in managing a small public library (For further information please contact your Ontario Library Service representative or go to the following link:)

Web links

The Joint OLS-North/SOLS [Clearinghouse of Professional information](http://www.sols.org/links/clearinghouse/index.htm) is a comprehensive source of information on a diverse range of library topics. It provides links to OLS-N and SOLS information, as well as external sources. You may browse the Clearinghouse using the topical subject list at <http://www.sols.org/links/clearinghouse/index.htm> or the alphabetical listing.

A section of particular interest is one on legislation:

- The Joint OLS-N/SOLS *Clearinghouse of Professional Information* has a section on [Legislation Affecting Public Libraries in Ontario](http://www.sols.org/links/clearinghouse/legislation/index.htm) (<http://www.sols.org/links/clearinghouse/legislation/index.htm>).

From that Clearinghouse page, there is a link to the [Ministry of Culture's](http://www.culture.gov.on.ca/english/library/legislation.htm) web site at <http://www.culture.gov.on.ca/english/library/legislation.htm> which contains information on Ontario legislation relating to libraries.

Materials

Library Trustee Development Program

SOLS has produced a number of publications of benefit to library trustees, all of which are posted on the SOLS [Publication page](#). Publications of interest include:

- Library Board Development Kit
- Trustee Tips
- Trustee 20/20

SOLS publications.

A list of publications is posted at <http://www.sols.org/publications/index.htm> . Some of these titles are available electronically while others must be purchased.

Titles in the Library Development Guide series include:

- #1 -*Strategic Hiring: A Guide to Staff Recruitment*. SOLS, 2003.
- #2 -*Coaching for Service and Success: A Guide to Performance Feedback*. SOLS 2003.
- #3 -*Creating the future you've imagined: a guide to essential planning*. Anne Marie Madziak, SOLS, 2007.
- #4 -*Trillium Public Library: Sample Policies*, Part 1, 2009 and Part 2, 2010.
- #5 -*Making the case for your library's building project*. Robert Hubsher & Karen Watson for SOLS, SOLS, 2010.
- #6 -*A Guide to Developing a Collection Plan.*, Helene Golden and Peggy Malcolm, SOLS, 2009.

Other titles from SOLS include:

The Library's contribution to your community: a resource manual for libraries to document their social and economic contribution to the local community. Prepared by dmA Planning and Management Services and Southern Ontario Library Service. SOLS, 2007.

A Technology planning kit for Ontario public libraries. Prepared by Katherine Slimman for Southern Ontario Library Service and Ontario Library Service-North. SOLS, 2001.

OLS-North publications

Crime Prevention and Personal Safety for Your Library and Community. OLS-North, 2004.

It takes a library to raise a community: a community development activities tool kit for public libraries. OLS-North, 2007.

Marketing Tool Kit. OLS-North, 2006.

Media Relations Tool Kit. OLS-North, 2007.

Municipal Councilor's Public Library Handbook. OLS-North, 2007.

Partnership Tool Kit: Assisting Northern Ontario's Public Libraries in initiating Community Partnerships. OLS-North, 2007.

Other

Accessible Library Services for Persons with Disabilities. Ontario Library Association. 2010.

Canadian Library Association Position Statements.

Clearinghouse of professional information. (A comprehensive source of information on a diverse range of library topics. It provides links to OLS-North and SOLS information, as well as external resources.)

CNIB Library Partners Program. CNIB

The Complete Library Technology Planner. John M. Cohn and Ann L. Kelsey. Neal-Schuman Publishers. 2010.

Cookbooks. Techsoup for libraries. (Cookbooks are tips and techniques compiled by librarians for librarians maintaining computers and electronic services in public libraries)

Electronic Collections Management forms, policies, procedures and guidelines manual. Rebecca Brumley. Neal-Schuman Publishers. 2009. (Covers many policies including web site, copyright, privacy)

Guidelines for rural/urban public library systems. Administrators of Rural/Urban Public Libraries of Ontario, 2005.

Library technology companion: a basic guide for library staff. John Burke. Neal-Schuman Publishers. 2006

Ontario Library Association Position Statements. Ontario Library Association.

Ontario Public Libraries - Statistics (most recent year). Ontario Ministry of Culture.

Scott, W., *The accessible Canadian library.* National Library of Canada. 1996

Technology made simple: an improvement guide for small and medium libraries. Kimberly Bolan and Robert Cullin. ALA Editions. 2007.

TechNotes. Public Library Association.

Webjunction: technology “a place for you to learn and share ideas about how to successfully integrate technology in your library”

Appendix B - Aids to Measurement

Library planners may wish to consult the following tools for assistance in comparing certain of their libraries' measures to those of other Ontario public libraries, or to standards or recommendations set out by various library organizations. Ontario sources have been cited where available.

A Note on the Tables

The tables of comparative figures that follow are based on Ontario public library data collected in 2004 by the Ontario Ministry of Culture.

The figures have been arranged in columns according to Population Category. Each category represents a population range. A library serving a population of seven thousand would, for example, consult the 5,000 to 10,000 population column.

Where possible, a separate category has been included for County Libraries. County library figures are also included under the Population Categories, which county library planners may use if they prefer.

For those measures which describe per capita service levels, the population categories are based on 'service' population, which includes the population of a library's own community as well as the populations of any municipalities, local services boards and/or First Nation bands that contract for service with that library. For all other measures, population categories are based on resident population (the population of the library's own community only). Libraries showing no local operating support and/or no staffing expenditure were excluded in determining the percentiles.

Under each Population Category, the figures have been divided into four rows or 'Levels'. The Levels One, Two, Three and Four are based on the 30th, 50th, 70th and 90th percentiles respectively for that category. (On occasion the figures may have been adjusted to ensure a gradual progression.) This will allow library planners to compare their own measures with those of other Ontario public libraries in the same population category and determine their relative place on the scale from Level One to Level Four. This information may then be incorporated into the library's planning process. For example, a library with a figure in the neighborhood of Level One may decide to try to increase that figure to Level Two or Level Three over a certain period of time.

1. STAFFING

- i) *Building libraries: guidelines for the planning and design of public libraries*. Ontario Ministry of Citizenship and Culture, 1986, p. 21.

1 staff member per 2,000 capita of population served.

- ii) Guidelines for rural/urban public library systems, ARUPLO, 2005. (Standards for multiple branch library systems)

One third of all system-wide staffs are accredited professional librarians. All library staff members are computer literate and able to work with Integrated Library Systems and other automated library functions.

- Less than 1,000 (Deposit Stations)
Branch Supervisor: Some post-secondary and/or library training
Excel and/or Library Technician training

- Small (Villages): 1,000-5,000 population
Branch Supervisor: Some post-secondary and/or library training
Excel and/or Library Technician training
1.0 – 2.5 FTEs

In smaller branch libraries additional staff is to be employed to meet the demands of library service transactions per staff hours as a guide. (13 transactions per staff hour gives adequate time to deal with circulation and reference work.)

- Medium: 5,000-10,000 population
Branch Supervisor: Accredited professional librarian or post-secondary and library training
Branch Assistant: Excel and/or Library Technician training
2.5 – 5 FTEs
- Large (Towns): 10,000-35,000 population
Every branch serving over 10,000 people has a Branch Supervisor with a Masters Degree from an accredited library program.
1 FTE professional librarian assigned to reference
1 FTE professional librarian assigned to children’s services
For every additional 10,000 people or part thereof, one of the full-time equivalent staff is a qualified librarian.
5 FTEs – 17.5 FTEs
- Urban (Large Urban branches located within a rural/urban library system): Population 35,000+)
65+ hours per week
Branch supervisor has a Masters Degree from an accredited library program
1 FTE professional librarian assigned to reference
1 FTE professional librarian assigned to children’s services
17.5 FTEs minimum
- Central Office/Administration
Each library system has accredited professional librarians at the system level. The CEO for each system is an accredited professional librarian.

All professional librarians should be utilized on a system-wide basis.

- iii) Comparative figures based on *Ontario Public Library statistics* gathered by the Ontario Ministry of Culture for the year 2004.

TABLE 1: FTE STAFF (@35 hours/week) PER 1,000 POPULATION

LEVEL	POPULATION CATEGORY (BASED ON 'SERVICE' POPULATION*)							County Systems
	less than 2,500	2,500 to 5,000	5,000 to 10,000	10,000 to 15,000	15,000 to 30,000	30,000 to 50,000	50,000 to 100,000	
One	0.71	0.37	0.29	0.31	0.39	0.45	0.43	0.41
Two	1.01	0.52	0.40	0.41	0.46	0.51	0.45	0.45
Three	1.41	0.61	0.50	0.47	0.54	0.57	0.49	0.56
Four	3.23	0.94	0.73	0.57	0.68	0.65	0.63	0.62

* *Service Population*: If your library serves any municipalities, local services boards and/or First Nation bands that contract for service with your library and receive an annual operating grant from the provincial government, use the combined populations of your own community along with those of any contracting communities in selecting the appropriate population category for your library.

TABLE 2: STAFF TRAINING EXPENDITURE AS % OF TOTAL STAFF EXPENDITURE

LEVEL	POPULATION CATEGORY (BASED ON 'RESIDENT' POPULATION*)							
	less than 2,500	2,500 to 5,000	5,000 to 10,000	10,000 to 15,000	15,000 to 30,000	30,000 to 50,000	50,000 to 100,000	County Systems
One	0.00%	0.44%	0.66%	0.56%	0.38%	0.58%	0.55%	0.86%
Two	1.05%	0.79%	0.92%	0.96%	0.61%	0.74%	0.85%	1.18%
Three	2.54%	1.54%	1.33%	1.48%	0.91%	0.83%	1.00%	1.73%
Four	4.47%	2.80%	3.10%	2.04%	1.68%	1.38%	1.19%	2.28%

* *Resident Population*: If your library serves any municipalities, local services boards and/or First Nation bands that contract for service with your library and receive an annual operating grant from the provincial government, use the population of your own community only in selecting the appropriate population category for your library.

2. SPACE

- i) *Making the case for your library building project*. Library development guide #5. SOLS. 2010

This Guide offers two approaches to estimating space requirements, the standards approach and the components approach, and explains how to use them.

- ii) The following links point to two well-developed and detailed space planning processes:

Library space planning guide, written and published by the Connecticut State Library, 2002.

Public library Space needs: a Planning Outline / 1998, by A.C. Dahlgren, published by the Wisconsin Department of Public Instruction.

- iii) *Building libraries: guidelines for the planning and design of public libraries*. Ontario Ministry of Citizenship and Culture, 1986, p. 21.

Building size determined by major components.

- a) Collection space: “Collection space can be determined by using the average standard of 10 volumes per square foot. This allows for low shelving and wider aisles in specialized functions such as children’s and reference collections, with regular shelving and aisle allocations in the larger nonfiction area.”

Space required = 1 square foot for every 10 volumes

- b) User space: “The acceptable standard for user space in a library is 5 user spaces per 1,000 capita. This allows for individual study stations in adult and children’s areas, as well as informal seating, reference tables, A/V stations, etc. A space of 30 square feet for each reader station is an acceptable standard.”

Space required = 30 square feet per user space @ 5 user spaces per 1,000 population

- c) Staff space: “The library standard used to determine the number of staff is 1 staff member per 2,000 capita. Staff space is determined by using a total space per staff member of 175 square feet. This figure includes work stations, reader service desks, circulation area, lounge, locker facilities, etc.”

Space required = 175 square feet per staff member @ 1 staff member per 2,000 population

d) Multipurpose rooms: “Each library should assign space for these rooms based on community service and program objectives.”

e) Non-assignable space: “Non-assignable space includes washrooms, janitorial space, mechanical, elevators, staircases, etc.” (The need for non-assignable space is reduced where the library shares washrooms, mechanical area, etc. with another tenant in one building.)

Space required = 20% of net space (i.e. 20% of the total of items a. to d.)

f) Minimum overall size: “The minimum size for an independent library should not be less than 4,000 sq. ft.” (372 m²)

iii) Guidelines for rural/urban public library systems, ARUPLO, 2005. (Standards for multiple branch library systems.)

- Deposit Stations: 1,000 sq. ft. – 2,500 sq. ft.
- Small Branches (Villages): Branches serving from 1,000 – 5,000 population
2,500 sq. ft. – 3,500 sq. ft. or .7 sq. ft. per capita
- Medium Branches: Branches serving from 5,000-10,000 population
3,000 sq. ft. – 7,000 sq. ft. or .7 sq. ft. per capita
- Large Branches (Towns): Branches serving from 10,000-35,000 population
7,000 sq. ft. – 21,000 sq. ft. or .6 sq. ft. per capita
- Urban Branches: Large urban branches located within a rural/urban library system serving populations 35,000 or greater
21,000 sq. ft. or .6 sq. ft. per capita

For space allocations for specific areas and functions, see *Guidelines for rural/urban public library systems*, p.8.

3. COLLECTION SIZE

i) “Collection development and management 1: Policy and Planning”, SOURCEBOOK for small public libraries. Sample 3.

Suggested minimum collection size:

Population served	Book stock (volumes)
Under 1,000	3,000 - 5,000
1,000 - 2,499	5,000 + 5 volumes per capita over 1,000 population
2,500 - 4,999	12,500 + 4 volumes per capita over 2,499 population
5,000 - 9,999	22,500 + 3 volumes per capita over 4,999 population
10,000 - 19,999	37,500 + 2 volumes per capita over 9,999 population

ii) *Guidelines for rural/urban public library systems*, ARUPLO, 2005. (Standards for multiple branch library systems)

- Deposit Stations: Minimum 7,500 volumes
- Small Branches (Villages): Branches serving from 1,000 – 5,000 population
 - 3 - 5 volumes per capita
 - Minimum 10,000 volumes
 - Print Periodicals: Minimum 10
 - Audio-Visual, Non-print: Minimum 350 items
- Medium Branches: Branches serving from 5,000-10,000 population
 - 3 - 4 volumes per capita
 - Minimum 20,000 volumes
 - Print Periodicals: Minimum 40-50
 - Audio-Visual, Non-print: Minimum 500 items
- Large Branches (Towns): Branches serving from 10,000-35,000 population
 - 3 volumes per capita
 - Minimum 30,000 volumes
 - Print Periodicals: Minimum 80-100
 - Audio-Visual, Non-print: Minimum 2,500 items
- Urban Branches: Large urban branches located within a rural/urban library system serving populations 35,000 or greater
 - 2 -3 volumes per capita
 - Minimum 70,000 volumes
 - Print Periodicals: Minimum 100-350
 - Audio-Visual, Non-print: Minimum 3,500 items

iii) Comparative figures based on Ontario Public Library statistics gathered by the Ontario Ministry of Culture for the year 2004.

TABLE 3: TOTAL VOLUMES HELD PER CAPITA - ALL MATERIALS EXCEPT PERIODICALS

LEVEL	POPULATION CATEGORY (BASED ON 'SERVICE' POPULATION*)							County Systems
	less than 2,500	2,500 to 5,000	5,000 to 10,000	10,000 to 15,000	15,000 to 30,000	30,000 to 50,000	50,000 to 100,000	
One	7.40	4.29	3.42	3.12	2.76	2.64	2.52	2.75
Two	10.69	5.99	4.36	3.92	3.51	3.23	2.90	3.34
Three	14.55	7.42	4.97	4.28	3.75	3.94	3.14	4.21
Four	20.65	8.90	7.33	5.14	4.32	4.56	4.02	4.83

* *Service Population*: If your library serves any municipalities, local services boards and/or First Nation bands that contract for service with your library and receive an annual operating grant from the provincial government, use the combined populations of your own community along with those of any contracting communities in selecting the appropriate population category for your library.

TABLE 4: PERIODICAL TITLES RECEIVED PER 1,000 POPULATION (Print and CD-ROM formats only)
POPULATION CATEGORY (BASED ON 'SERVICE' POPULATION*)

LEVEL	less than 2,500	2,500 to 5,000	5,000 to 10,000	10,000 to 15,000	15,000 to 30,000	30,000 to 50,000	50,000 to 100,000	County Systems
One	5.89	5.09	4.33	3.35	3.69	3.57	2.68	2.06
Two	15.69	7.62	6.46	4.69	4.63	4.96	3.65	3.14
Three	29.25	12.80	8.14	6.69	5.43	6.15	4.21	4.26
Four	35.50	19.27	15.12	8.97	7.35	9.85	5.50	9.50

* *Service Population*: If your library serves any municipalities, local services boards and/or First Nation bands that contract for service with your library and receive an annual operating grant from the provincial government, use the combined populations of your own community along with those of any contracting communities in selecting the appropriate population category for your library.

4. ACQUISITIONS

- i) A minimum annual replacement rate in the neighborhood of 5% is referred to in “Collection development and management 1: Policy and Planning”, SOURCEBOOK for small public libraries. Sample 3.
- ii) Guidelines for rural/urban public library systems, ARUPLO, 2005. (Standards for multiple branch library systems)
 - Each branch has an up-to-date collection, with a minimum of 20% of the materials purchased and published within the last five years.

5. COLLECTION USE

Comparative figures based on Ontario Public Library statistics gathered by the Ontario Ministry of Culture for the year 2004.

TABLE 5: ANNUAL CIRCULATION PER CAPITA

POPULATION CATEGORY (BASED ON 'SERVICE' POPULATION*)

LEVEL	less than 2,500	2,500 to 5,000	5,000 to 10,000	10,000 to 15,000	15,000 to 30,000	30,000 to 50,000	50,000 to 100,000	County Systems
One	3.84	4.45	4.29	6.05	6.76	6.05	6.81	5.83
Two	6.10	5.97	5.20	7.44	7.82	6.60	7.96	6.39
Three	9.08	7.27	7.86	8.39	9.59	7.68	9.01	6.83
Four	16.60	13.99	10.65	9.48	10.94	11.32	11.96	9.32

* *Service Population*: If your library serves any municipalities, local services boards and/or First Nation bands that contract for service with your library and receive an annual operating grant from the provincial government, use the combined populations of your own community along with those of any contracting communities in selecting the appropriate population category for your library.

TABLE 6: ANNUAL TURNOVER RATE (CIRCULATION DIVIDED BY CIRCULATING VOLUMES)

LEVEL	POPULATION CATEGORY (BASED ON 'RESIDENT' POPULATION*)							
	less than 2,500	2,500 to 5,000	5,000 to 10,000	10,000 to 15,000	15,000 to 30,000	30,000 to 50,000	50,000 to 100,000	County Systems
One	0.43	0.86	0.92	1.68	2.04	1.94	2.27	1.47
Two	0.59	1.13	1.44	2.02	2.55	2.30	2.71	2.01
Three	0.98	1.33	1.86	2.35	2.75	2.67	3.42	2.12
Four	1.66	2.07	2.64	3.47	3.72	3.40	4.57	2.67

* *Resident Population*: If your library serves any municipalities, local services boards and/or First Nation bands that contract for service with your library and receive an annual operating grant from the provincial government, use the population of your own community only in selecting the appropriate population category for your library.

6. HOURS OPEN TO PUBLIC

- i) *Guidelines for rural/urban public library systems*, ARUPLO, 2005. (Standards for multiple branch library systems)
- Less than 1,000 (Deposit Stations)
Non-accredited: 12 hours per week minimum
 - Small (Villages): 1,000-5,000 population
20 - 25 hours per week
 - Medium: 5,000-10,000 population
25 - 35 hours per week
 - Large (Towns): 10,000-35,000 population
35 - 60 hours per week
 - Urban (Large Urban branches located within a rural/urban library system; e.g., Sarnia, Kingston, Chatham; Population 35,000+)
65+ hours per week

7. INTERIOR LIGHTING

David Malman. *Lighting for libraries*. Libris Design Project. 2001, Revised 2005.

A commonly used measure of illumination is the foot-candle.

Examples of lighting standards

Area	Foot-candles
General reading and staff areas	30-40
Staff service desks, patron reading tables or carrels	40-50
Staff book sorting and worktable	50
Large meeting or community rooms	30-40, dimmable to 5

Appendix C – Core Reference Tools

In previous editions of the *Ontario Public Library Guidelines*, a list of eleven basic print reference resources that every public library in Ontario should have was provided in Appendix C. Over time, it has become apparent that there are a number of reference tools for which an electronic version is the best choice. For this edition of the *Guidelines*, the list has been updated to include possible substitute titles or resources in electronic form. These titles are examples, not necessarily recommendations, and were current as of April, 2007.

Please note that, in the ‘Ready Reference’ section of Joint OLS-N/SOLS Clearinghouse at <http://www.library.on.ca/links/clearinghouse/readyref/index.htm>, there are links to most of the electronic resources listed in this appendix. In the table, the direct web link to the resource is posted. Another avenue is the resources that are now available for every public library through the Knowledge Ontario initiative, for example, databases from Thomson-Gale and EBSCO. More information on that initiative is posted at <http://knowledgeontario.ca/>.

Required resource	Print (examples)	Electronic (examples of possible resources)
1. General encyclopedia, useful to a wide range of ages, published in the last five years.	<i>World Book</i> <i>Britannica</i>	Parts available free, main parts are available by subscription through COOL (Consortium of Ontario Libraries) http://www.library.on.ca/resourcesharing/coolcpa/whatiscool.htm World Book – www.worldbook.com Britannica – www.britannica.com Free online resources (examples): The Columbia Encyclopedia http://www.bartleby.com/65/ The Wikipedia http://en.wikipedia.org/wiki/Main_Page Encyclopedias from Refdesk.com http://refdesk.com/topency.html
2. Canadian encyclopedia	No recent print	Historica Foundation maintains a Canadian encyclopedia at http://www.thecanadianencyclopedia.com/
3. English dictionary	<i>Random House</i> or <i>Canadian Oxford</i>	www.onelook.com (indexes 931 dictionaries) www.dictionary.com
4. English-French/French-English dictionary	Larousse or Collins	<i>Le grand dictionnaire terminologique</i> is a bilingual Canadian dictionary, available at http://www.granddictionnaire.com/btml/fra/r_motclef/index1024_1.asp
5. General almanac published in the last two years	<i>World Almanac & Book of Facts</i> or <i>InfoPlease Almanac</i>	<i>InfoPlease Almanac</i> is available at http://www.infoplease.com/almanacs.html The <i>CIA Factbook</i> is at https://www.cia.gov/cia/publications/factbook/index.html
6. Canadian almanac published in the last two years	<i>Canadian Almanac and Directory</i>	The <i>Canadian Almanac and Directory</i> is available online by subscription from Grey House Publishing Canada. More information on the online or print volumes is available at http://www.greyhouse.ca/almanac.htm

Required resource	Print (examples)	Electronic (examples of possible resources)
7. Current Ontario government directory	No longer available in print	INFO-GO is an online directory of government staff which is posted at http://www.infogo.gov.on.ca/infogo/mainPage.do
8. General world atlas published in the last three years	<i>New Concise World Atlas</i> (Oxford University Press, 2007)	From <i>National Geographic</i> : http://plasma.nationalgeographic.com/mapmachine/index.html From the Government of Canada: http://atlas.gc.ca/site/english/index.html From <i>Canadian Geographic</i> : http://www.canadiangeographic.ca/
9. Current telephone and postal code directories (the local telephone directory, as well as the directory for nearby larger town(s) or city(s) visited frequently by residents of community)		Bell Canada has a free resource with reverse look-up, yellow pages, and access to maps at www.canada411.ca Published under the trademark Infobel, Kapitool provides access to telephone listings from around the world posted at http://www.infobel.com/teldir/ Canada Post provides an on-line postal code search feature at http://www.canadapost.ca/segment-e.asp
10. Thesaurus	<i>Roget's</i>	Possible online choices are <i>Roget's Thesauri</i> , posted at http://www.bartleby.com/thesauri/ , and Dictionary.com which is a multi-source dictionary search service produced by Lexico Publishing and posted at www.Dictionary.com .
11. Book of quotations	<i>Bartlett's Quotations</i>	Possible online choices are the quotations service of Yahoo, posted at http://ca.dir.yahoo.com/reference/quotations/ , and the quotations services of Bartleby, posted at http://www.bartleby.com/quotations

Appendix D – Meeting the Community Analysis Requirements of the Ontario Public Library Guidelines

The *Public Libraries Act* requires that library boards in Ontario develop and deliver “a comprehensive and efficient public library service that reflects the community’s unique needs.” To develop programs and services that are responsive to community needs, library boards and staff need to be familiar with the demographics of the population served by the library and knowledgeable about community characteristics, local agencies and services, interests and concerns. This involves collecting and synthesizing information in order to develop a comprehensive profile of the community served by the library. In the process, it is important to consider a variety of sources and types of information. For a systematic approach to developing a community profile, consult the ‘Situational Analysis’ section of the publication from the Southern Ontario Library Service called, *Creating the Future You’ve Imagined: A Guide to Essential Planning* (2007). A copy was distributed to every library in Ontario.

Sources of community information

Important sources of community information include census data from Statistics Canada and population projections from municipal planning departments and/or local boards of education. The library board’s planning and service decisions should be based on an analysis of current and projected demographic factors such as: age; mother tongue; social-economic status; education; and occupation. Additional information, not always readily available but important for planning library service, includes the literacy rate, computer literacy and availability, and overall information needs of the community. It can be helpful to compare the demographics and characteristics of the library user population to those of the general population. Such comparisons may reveal under-served segments of the population and/or the need for new or modified services.

Surveys

A survey is a common means of assessing the community’s library and information needs, as well as exploring public perceptions and expectations regarding the roles played by the public library in the community. Properly administering a community survey in such a way that the results are reliable and valid is an ambitious undertaking. Because a survey produces data and feedback that cannot be obtained elsewhere, it is a worthwhile undertaking. It is important to recognize, however that a survey demands a significant investment in staff time and expertise. For your convenience, a sample community survey instrument is included later in this appendix. It may also be possible to have the library included in surveys conducted by the Municipality concerning local recreational and cultural services. For further information on surveys, there are two guides on developing and administering surveys, published by the Southern Ontario Library Service:

- *Creating the Future You’ve Imagined: A guide to essential planning (Library Development Guide #3 – 2007)*
- *The Library’s Contribution to Your Community: a resource manual for libraries to document their social and economic contribution to the local community* (2nd edition, 2007)

Other means of consulting with the public

In addition to surveys, there are other worthy means of consulting with the public. Focus groups, interviews, public meetings and open houses may all have roles to play in encouraging the public to think and talk about their library and information needs, their experience of the public library and their understanding of its role in the community. One particularly engaging means of involving a number of people is for the library to host a two hour dialogue with 15 to 25 people who have been identified as community leaders and/or representatives of organizations making a significant contribution to community life. The individual(s) facilitating the gathering will prompt discussion of key community characteristics, concerns, gaps in services and recognized strengths or assets. It may also provide an excellent opportunity to collectively explore roles the library might play in the community.

Obtaining user feedback

Since the people responsible for developing library service have an obligation to anticipate and respond to both the current library users and the larger population served by the library, user feedback is an important aspect of community analysis. There are many methods of consulting with library users, including ongoing, informal mechanisms like a suggestion box, or a universal appeal for feedback on the library's website, as well as more formal undertakings such as user surveys, key informant interviews and focus groups. Consulting current users of the library's programs and services is necessary for assessing how successful the library is at providing appropriate and relevant library service. For a variety of methods for gathering user feedback you can refer to *Creating the Future You've Imagined: A Guide to Essential Planning*.

It is important that a community analysis, including public input, be conducted on a regular basis. Library boards and staff share responsibility for gathering the information and analyzing its implications for library service. Making this commitment at least once every four years ensures that every board term includes an opportunity to assess community needs, evaluate current performance and plan how the library's programs and services will meet those needs. As representatives of the community, this is a vital part of the board's responsibility.

Sample Community Survey

1. **How important is it to you that your community provides good quality public library service?**
(PLEASE CHECK ONE ONLY)

Very important Important Somewhat important Not important Don't know

2. **How often do you visit the library?** (PLEASE CHECK ONE ONLY)

at least once a week once every 2-3 weeks once a month once every 2-3 months
at least once every 6 months at least once a year once every few years never

3. **If you HAVE NOT USED the library within the last year, is there a reason?**

lack of time parking inconvenient hours inconvenient use other library
library doesn't have what I need location inconvenient I don't need a library

other (PLEASE SPECIFY) _____

What improvements or changes would encourage you to come to the library?

4. **IF YOU HAVE VISITED THE LIBRARY IN THE PAST YEAR, would you say that, in general, the library's services are:**

Excellent Good Satisfactory Poor Don't know

What is the single most important purpose for which you use the library?

To borrow reading material for leisure time use

To borrow a/v materials for leisure time use

To find information and materials related to school

To find information and materials related to job or career

To find information and materials related to personal needs or interests

To attend library programs

To read magazines and newspapers

To get answers to specific questions

To access the Internet

Other (PLEASE SPECIFY) _____

5. **What days and times of the week are most convenient for you to visit the library?**
(PLEASE CHECK AS MANY AS APPLY)

	Mon.	Tue.	Wed.	Thu.	Fri.	Sat.	Sun.
9 - 12 a.m.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12 - 5 p.m.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5 - 7 p.m.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7 - 9 p.m.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

6. **How many years have you lived in this community?**

all my life more than 25 years 11 - 25 year s 5 - 10 years less than 5 years

7. **What is your age group?**

12 or younger 13 -18 19 - 24 25 - 34 35 - 64 65 - 74 75 and older

8. **What language do you prefer to read in?**

English French Other (PLEASE SPECIFY) _____

9. **Do you have any additional comments about library services in this community?**

On behalf of _____ Public Library, thank you very much for completing our survey. Your feedback is valuable to us and very much appreciated. Please return your survey to the library by _____.

Sources of information other than surveys

Guideline	Information needed	Possible source
<p>1.3.2 Community analysis - A range of community-related information with possible implications for library service, including demographic data, is gathered and formally analyzed at least once every four years, and the results used in the planning of library service.</p>	<ul style="list-style-type: none"> • demographic information about the overall community - age, gender, employment, educational level, languages spoken, income levels, populations projections • library use • materials and services that are most used • open hours that are most popular • materials and services that are not available but would be used 	<ul style="list-style-type: none"> • Statistics Canada Community Profiles are available on the Internet at http://www.statcan.ca/ These will provide most of the basic demographic data from the latest census • municipal planning projections for population and development • school board registration projections • Annual Survey • annual review of library usage and performance statistics (e.g. circulation by Dewey number) • annual sample count of one week's circulation and library use by hour (<i>This will indicate popular times among current library users only. Similar information about non-users, some of whom may not use the library because the hours are not convenient, can be obtained in a community survey.</i>) • public suggestion box • records of unfilled information requests • records of ILLO requests
<p>1.3.3 Consultation of users - Library users are consulted regularly concerning library service (e.g. by means of surveys, focus groups, formal and informal interviews, open houses, suggestion box, website, etc.). An analysis of public comments and suggestions is carried out at least once a year and the results used in the planning of library service.</p>	<ul style="list-style-type: none"> • materials and services that are most used • materials and services that are not available but would be used • evaluation of services 	<ul style="list-style-type: none"> • annual review of library usage and performance statistics (e.g. circulation by Dewey number) • public suggestion box • records of unfilled information requests • records of ILLO requests
<p>3.1.6 Staffing - a) The library has in place a process for regularly assessing the number of staff required to meet community needs (as determined, for example, by such circumstances as level of activity, number of users, and total hours open).</p>	<ul style="list-style-type: none"> • number of circulations per hour open • number of circulations per staff member 	<ul style="list-style-type: none"> • Annual Survey • Annual Survey

<p>Where the existing number of staff has been determined to be inadequate, the library has a plan in place to improve the situation.</p>	<ul style="list-style-type: none"> • population projections • membership numbers 	<ul style="list-style-type: none"> • municipal planning projections for population and development • library statistics
<p>3.2.1 Content and size of collection - The library has a process in place for regularly assessing the content and size of the collection required to meet community needs. (Materials may be owned by the individual library or shared with a group of libraries in a materials pool.) Where the existing content and/or size of the collection has been determined to be inadequate, the library has a plan in place to improve the situation.</p>	<ul style="list-style-type: none"> • demographic information about the entire community - age, gender, employment, educational level, languages spoken, income levels, populations projections • materials and services that are most used • materials and services that are not available but would be used • adequacy of collection size and content 	<ul style="list-style-type: none"> • Statistics Canada Community Profiles, available on the Internet at http://www.statcan.ca/, will provide most of the basic demographic data from the latest census • municipal planning projections for population and development • school board registration projections • annual review of circulation by Dewey number • public suggestion box • records of unfulfilled information requests • records of ILLO requests <i>(These three pieces above will provide less useful information than could be gained from a survey.)</i> • volumes per capita compared to means and medians in Ontario Public Library Statistics • circulation per capita compared to volumes per capita • turnover rate • public suggestions for purchase
<p>3.2.6 Formats and languages - The library offers materials in a suitable variety of formats and languages reflecting the community's needs (e.g. books, periodicals, audio recordings, video recordings, materials for the disabled, CD-ROM products, on-line products, archival and local history materials, materials in languages reflecting local linguistic groups).</p>	<ul style="list-style-type: none"> • languages spoken by residents • literacy levels / educational levels • availability of materials in other languages and formats from other local sources 	<ul style="list-style-type: none"> • Statistics Canada Community Profiles, available on the Internet at http://www.statcan.ca/, will provide most of the basic demographic data from the latest census • list of organizations providing materials (e.g. cultural groups, heritage language classes, video rental outlets, school libraries etc.)

	<ul style="list-style-type: none"> • use of other languages and formats in the library 	<ul style="list-style-type: none"> • circulation statistics of materials in other languages and formats, by language and by format
<p>3.4.1 Space - The library has undertaken a planning process which has examined the library's space requirements in light of local needs. Where the existing space has been determined to be inadequate, the library has a plan in place to improve the situation.</p>	<ul style="list-style-type: none"> • population projections • in library use patterns 	<ul style="list-style-type: none"> • municipal planning projections for population and development • school board registration projections • annual sample count of use of reference materials, study spaces, reading areas
<p>4.7.1 Programming/Community need - The library has determined what community needs exist for what types of programs and for which age levels. (For example, programming is an integral part of most children's services and is used to promote lifelong use of libraries, to stimulate a love of literature and reading, and to impart important information and skills.). Where there is a demonstrated need, the library offers programs to the community as appropriate, either alone or in conjunction with other local organizations (e.g. story hour for pre-schoolers; reading clubs; lectures; demonstrations; author readings).</p>	<ul style="list-style-type: none"> • activities desired but not available in the community • population age ranges 	<ul style="list-style-type: none"> • list of local organizations and schools offering activities and identification of gaps (<i>These will provide less useful information than could be gained from a survey.</i>) • records of unfilled information requests • records of ILLO requests • public suggestions • Statistics Canada Population and Dwelling Characteristics - Census Divisions and Subdivisions; Ontario Part 1
<p>4.8.1 Community information/Community need - The library has determined what community needs exist for providing general information about the community. Where there is a demonstrated need, the library provides a community information service as appropriate, either alone or in conjunction with other local organizations and events.</p>	<ul style="list-style-type: none"> • community information which is needed but not readily available to the public 	<ul style="list-style-type: none"> • list of local information sources and identification of gaps • records of unfilled information requests
<p>4.9.1 Local history/Community need - The library has determined what community needs exist for a local history resource. Where there is a demonstrated need, the library provides a local history service as appropriate, either on its own or in conjunction with other local organizations.</p>	<ul style="list-style-type: none"> • interest in local history not being met 	<ul style="list-style-type: none"> • other sources of local history information (e.g. National Archives for local newspapers, LACAC for architectural information, neighbouring local history collections) • records of unfilled information requests

**Appendix E – List of Guideline Section Numbers
in Editions 4 & 5**

FOURTH EDITION		FIFTH EDITION	
		mOdified - New - Deleted	
SECTION 1 - GOVERNANCE/ADMIINISTRATION		SECTION 1 - GOVERNANCE/ADMIINISTRATION	
1.1	Board		1.1 Board
1.2	Policy		1.2 Policy
1.3	Planning	O	1.3 Planning
1.4	Finance		1.4 Finance
1.5	Advocacy		1.5 Advocacy
1.6	Board orientation	O	1.6 Board orientation
SECTION 2 - ACCESSIBILITY		SECTION 2 - ACCESSIBILITY	
2.1	Location of service outlet(s)		2.1 Location of service outlet(s)
2.2	Hours		2.2 Hours
2.3	Access for People with a Disability	O	2.3 Access for People with a Disability
2.4	Parking		2.4 Parking
2.5	Accessible Shelving	O	2.5 Materials & Equipment
2.6	Telecommunications	D	2.6 Telecommunications
		N	2.6 Access to Technology
		N	2.7 Remote access
2.7	Housebound	O	2.8 Housebound
2.8	Exterior signage		2.9 Exterior signage
2.9	Library layout		2.10 Library layout
2.10	Publicity	O	2.11 Publicity
SECTION 3 - RESOURCES		SECTION 3 - RESOURCES	
3.1	Staff	O	3.1 Staff
3.2	Materials & Information	O	3.2 Collections
3.3	Access to information	O	3.3 Access to information
3.4	Facilities	O	3.4 Facilities
3.5	Safety, Security and Emerg.	O	3.5 Safety, Security and Emerg.
3.6	Technology	D	3.6 Technology
SECTION 4 - SERVICES		SECTION 4 - SERVICES	
4.1	Lending of library materials	O	4.1 Lending of library materials
4.2	Reference & Info. service	O	4.2 Reference & Info. service
4.3	Readers advisory service	O	4.3 Readers advisory service
4.4	Children's services	O	4.4 Children's services
4.5	YA services	O	4.5 YA services
4.6	Minorities		4.6 Minorities
4.7	Programming	O	4.7 Programming
4.8	Community Info	O	4.8 Community Info
4.9	Local history	O	4.9 Local history
4.1	Community space	O	4.1 Community space

SECTION 5 - CO-OPERATION AND PARTNERSHIPS		SECTION 5 - CO-OPERATION AND PARTNERSHIPS	
5.1	Resource sharing	O	5.1 Resource sharing
5.2	Links with orgs		5.2 Links with orgs
SECTION 6 - MULTIPLE-BRANCH LIBRARY SYSTEMS		SECTION 6 - MULTIPLE-BRANCH LIBRARY SYSTEMS	
6		O	6
SECTION 7 - TECHNOLOGY		SECTION 7 - TECHNOLOGY	
	N/A	N	7.1 Tech planning, policy & admin
		N	7.2 Communications/networks
		N	7.3 Computer equipment
		N	7.4 Library software
		N	7.5 Library web sites/services
		N	7.6 Staffing for IT