

Ontario Public Library Guidelines - 2022 Edition

Level	Area	Section	Number of mandatory questions	Total number of questions	Number of potential N/A	
System	I	Governance & Administration	1 Organization of the Governing Body	6	6	0
			2 Development of Policy	3	3	0
			3 Governing Body's Role in Planning	0	2	0
			4 Finances	5	5	0
			5 Advocacy	2	4	0
			6 Orientation & Information for Governing Body Members	3	4	0
			Total	19	24	0
	II	Planning Documents & Process	7 Planning	6	8	0
			8 Planning for Library Collections	0	5	0
			9 Planning for Services	1	4	0
			10 Planning for Programming	0	3	0
			11 Planning for Technology	1	5	0
			Total	8	25	0
	III	Policy	12 Safety, Security & Emergencies	4	5	0
			13 Collection & Circulation	4	4	0
			14 Service Policies	5	11	1
			15 Use of Technology	3	4	0
			Total	16	24	1
	IV	Personnel & Human Resources	16 Human Resources	6	8	0
			17 Evaluation and Training	6	8	1
			18 Staff Procedures	6	7	0
			Total	18	23	1
	V	General	19 Library	1	3	0
			20 Access to Services	0	2	0
			21 Collection Management	2	5	0
			22 Co-operation & Partnerships	1	6	0
			23 Library Website and Web-based Services	3	8	0
			Total	7	24	0
Sub-total for system-wide guidelines			68	120	2	

Level	Area	Section	Number of mandatory questions	Total number of questions	Number of potential N/A	
On Site Observation	VI	Collections & Services	24 Collections	2	12	0
			25 Services	4	13	5**
			26 Technology Services	4	9	0
			Total	10	34	0
	VII	Physical & Facilities	27 Looking at the exterior	2	6	0
			28 Spaces within the library	0	12	0
			29 Access within the library	1	8	1
			30 Safety considerations within the library	2	4	0
			Total	5	30	1
		Sub-totals for 'On-site observation' section	15	64		
		<i>Grand totals</i>	83	184	2	

Note 1 – Optional questions - **The optional questions in Section 25 are not counted in the numbers for this section, but rather auditors are invited to offer comments on these topic areas if they are not achieved.

Note 2 - Potentially “not applicable” statements:

- **14.7 - Local History Policy** – If another community organization or museum provides the local history mandate, you may receive a ‘not applicable’ here.
- **14.8 - Public Meeting Room Policy** - If your library does not provide meeting space, you may receive a ‘not applicable’ here.
- **17.1 - Performance Appraisal** - Libraries where the CEO is the only staff, may receive a ‘not applicable’ here.
- **29.8 - Multiple-Floor Structures** - If your library does not have a public second floor space, you may receive a ‘not applicable’ here.

LEVEL-SYSTEM [One form per system]

Area I: Governance & Administration

Section/Topic	#	Item	M	Y/N	N/A	Comments/Notes
Section 1 Organization of the Governing Body	<i>Preamble - To function effectively, a governing body requires a formal framework, including officers and rules for meetings. Such a structure provides an organized way to conduct business.</i>					
	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			
	1.2	Officers - The governing body has appointed a chair, secretary, and treasurer and employs a CEO who provides CEO duties solely dedicated to the library for no fewer than 20hrs/week (of a 35-hour work week).	M			
	1.3	Meetings - The governing body conducts formally scheduled, regular meetings at least seven times per year. These are advertised within the library and/or online to ensure meetings are open to the public, unless parts or all of a meeting are closed in accordance with legislation.	M			
	1.4	Record - The governing body keeps a written record of the proceedings of its meetings and ensures it is available to the public.	M			
	1.5	Terms of Reference - The governing body has established written terms of reference for its officers and committees (for example: for the chair, secretary, treasurer, standing and ad hoc committees).	M			Example: Trillium Public Library
	1.6	Bylaws - The governing body maintains procedural bylaws which address its responsibilities, organization, meetings, finances, and amendment of bylaws.	M			Example: Trillium Public Library
Section 2 Development of Policy	<i>Preamble - Policy is the governing body'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 strategic goals, and ensure that the library's philosophy or mission is implemented. Policies are only considered official when they are in written form, approved by the designated authority and reviewed (and revised if necessary) at regular intervals.</i>					
	2.1	Written Policy Process - Written policies are available to guide all areas of library operations and services and are approved by the governing body as required by legislation and governance policy.	M			Example: Trillium Public Library
	2.2	Distribution - Up-to-date copies of policies are readily available to all governing members, employees, and the public in a variety of formats, including accessible formats.	M			
	2.3	Review - The governing body has a schedule to review all policies within a 4-year period.	M			Example: Trillium Public Library

Section 3 Governing Body's Role in Planning	Preamble -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 & responsible manner; and the library's governing body & staff share a common understanding of what the library is trying to achieve.					
	3.1	Review of Plans - The governing body regularly reviews the library's plans on a fixed timeline or schedule (e.g. standing agenda item(s) on the monthly agenda, scheduled special review or advisory meetings or other special meetings or retreats for the purpose of discussing and tracking planning activities).				Example: Blue Mountains Public Library
	3.2	Report to Public - The governing body regularly reports to the community on the library's progress in fulfilling its plans (e.g. Newsletters, Town Halls, Community Information Nights, Reports to Council)				Examples: Blue Mountains Public Library , Midland Public Library
Section 4 Finances	Preamble - The governing body 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 governing body 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 budget.					
	4.1	Budget - The governing body, in co-operation with the CEO, prepares and approves an annual operating budget for the library.	M			Examples: Prince Edward County Public Library , Blue Mountains Public Library
	4.2	Financial Records - The governing body ensures the library's finances are maintained in the fashion outlined by applicable legislation, advised accounting practices and approved policy.	M			Example: Grand Valley Public Library
	4.3	Financial Reports - The financial records are received and reviewed by the governing body.	M			Example: Midland Public Library
	4.4	Financial Reports to Funders - The governing body ensures that full and accurate financial and/or post-project reports are completed on-time and as required by any funder.	M			Example: Canada Summer Jobs Report – Blue Mountains Public Library
	4.5	Annual Survey of Public Libraries and Financial Reporting Requirements - The governing body ensures that the Annual Survey of Public Libraries, Public Library Operating Grant application form and any other application forms and financial reporting requirements are completed and submitted in accordance with provincial government requirements	M			
Section 5 Advocacy	Preamble - The library's governing body 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.					
	5.1	Advocacy Policy - The governing body maintains a written policy which defines its role and responsibilities with respect to advocacy.	M			Example: Trillium Public Library
	5.2	Informing Council - Information about the library's activities, accomplishments and needs is provided by the library to its funding Council(s) on a regular basis (e.g. a briefing document or monthly, quarterly or annual report).	M			Example: Blue Mountains Public Library
	5.3	Meetings with Council(s) - The governing body meets with its funding				Example: Blue Mountains Public Library

		Council(s) to review the library's value to the community, the library's services, its plans and achievements, or annual reports. Meetings with a Council should be formally scheduled to deliver annual reports, make special presentations and support business cases made to Council on behalf of the library. A presentation for an annual budgetary estimate, a formal review of the budget or discussion with a Council finance committee does not constitute the minimum standard or intent of this guideline.				
	5.4	Participation in Advocacy Activities - Governing body members participate regularly in activities aimed at increasing community awareness of the variety and importance of library services (e.g. through participation in Ontario Library Week, First Nations Public Library Week, and in local celebrations and events).				
Section 6 Orientation and Information for Governing Body Members	Preamble - Formal orientation of the incoming governing body to library services, policies and current issues will help them to participate fully and effectively in their work. On-going provision of information is necessary to keep members up-to-date and to maintain their effectiveness.					
	6.1	Duties and Responsibilities - Governing body members are provided with written guidelines outlining their duties and responsibilities.	M			Example: Blue Mountains Public Library
	6.2	Orientation - The governing body ensures that a thorough orientation program is carried out for all members, including: a tour of the library facility and website; the Governance Hub; and overviews of governance, policy, legislation, plans, process, personnel, accessibility, collections, services, technology and its use, and facilities.	M			Example: Muskoka Lakes Public Library
	6.3	Current Information - Governing body members are kept up-to-date on new developments in library matters (e.g. through membership in Ontario Library Association (OLA) or its associated councils such as OLBA; through membership in groups like the Federation of Ontario Public Libraries; through information provided by the CEO and chair; through regular information sessions at meetings; through participation in Ontario Library Service meetings and training events).				
	6.4	AODA (Accessibility for Ontarians with Disabilities Act, 2005) Customer Service Training - The governing body has undergone the mandatory Customer Service training as it pertains to developing, reviewing and ratifying policy.	M			Example: Blue Mountains Public Library
			19	24	0	
		Actual				
		Percentage (All Mandatory required; 90% of total statements required)				

LEVEL-SYSTEM *[One form per system]*

Area II: Planning Documents & Process

Section/Topic	#	Item	M	Y/N	N/A	Comments/Notes
Section 7 Planning	7.1	Planning Policy - The governing body maintains written policy which defines its role and responsibilities with respect to planning. The Planning Policy should consider the mandatory technology and accessibility plans, as well as other non-mandatory plans identified within this document.	M			Examples: Trillium Public Library , Prince Edward County Public Library
	7.2	Community Analysis - A range of community-related information with possible implications for library service, including demographic data, is analyzed at least once every four years.	M			Example: Blue Mountains Public Library
	7.3	Community Consultation - Community members are consulted regularly concerning library service (e.g. by means of surveys, focus groups, formal and informal interviews, open houses, suggestion box, website, social media, etc.).	M			
	7.4	Assessment of Service Hours - The open hours of the library reflect the needs of its community and include evenings and/or weekends. During the last four years the library has assessed how well its open hours match community need. Where there are multiple branches, each branch's hours are tailored to its surrounding community.	M			
	7.5	Performance Measurement Indicators and Statistics - Data from performance measurements (e.g. circulation statistics, program attendance/evaluations, usage rates, etc.) has been used to inform planning documents.	M			Example: Blue Mountains Public Library
	7.6	Planning Document - The governing body and library staff have developed and approved a formal planning document which guides the library's overall direction and includes at least some of the following items: mission and vision statements, values, goals and objectives, strategic directions and action plans which are current and actively reviewed to track progress of the document. (e.g. Strategic Plan, Business Plan, Operational Plan, Official Plan, etc.).	M			Examples: Centre Hastings Public Library , Midland Public Library , Blue Mountains Public Library
	7.7	Facility Planning - The governing body strives to provide adequate and inviting space for the collections, library staff to carry out their duties, and publics' use of library equipment, resources, and services. It has undertaken a planning process at least every 4 years which has examined the library's space requirements, addressing any inadequacies.				
	7.8	Participation in Local Planning - The library has representative(s) who participate proactively in local and/or county government planning processes.				

Section 8 Planning for Library Collections	8.1	Content and Size of the Physical Collection - The library has methods that accurately measure collection size, content, and use to meet community needs. (Materials may be owned by the individual library or shared with a group of libraries in a materials pool).				Example: Blue Mountains Public Library PROFILE INFO The library currently holds ____ volumes per capita in its physical collection-(see <i>Introduction & Resource materials</i> Appendix 2)
	8.2	Content and Size of E-Collection - The library has methods that accurately measure collection size, content, and use to meet community needs. (Materials may be owned by individual library or shared with a group of libraries in a materials pool).				
	8.3	Inventory - An inventory of the library's collection is carried out on a regular basis and is completed at least once every five years. This ensures that the catalogue accurately reflects the contents of the collection.				Example: Blue Mountains Public Library
	8.4	Collection Plan - The library system has established a written collection development plan reflecting collection priorities. The plan includes long and short-term collection profiles, as well as a buying plan for physical, shared, and electronic collections. As informed by Guidelines 8.1 and 8.2.				Examples: Centre Hastings Public Library , Blue Mountains Public Library
	8.5	Collection Maintenance Procedures - Concise written procedures are in place for the acquisition and withdrawal of materials within the library's entire collection. These procedures reflect known authoritative standards and practices such as the CREW guidelines and utilize established or known functions within the library's automated system to access reports on the number of items entering and/or leaving the collection.				Example: West Perth Public Library
SECTION 9 Planning for Services	9.1	Service Level – Each library system must determine the service level, the nature of its services, and what will be offered to the public. The library produces updated profiling documentation pertaining to the level of service at any and all locations (e.g. number of hours open, types of materials, electronic infrastructure, and types of services). Where there are multiple branch libraries, the hours and services offered in each of these libraries should be based on the needs and characteristics of the local community it is meant to serve.				
	9.2	Monitoring of Service - The library has a process for measuring the number and recording the types of requests for information that are made. (e.g. in person,				

		telephone, fax, online, email and other electronic means). This information is incorporated into the library's planning process in order to review trends/gaps in service. Typical week information collection is an example of this process.				
	9.3	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, and newcomers). Where there is a demonstrated need, the governing body 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.				
	9.4	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.	M			Examples: Fort Frances Public Library , Blue Mountains Public Library
Section 10 Planning for Programming						
	10.1	Community Programming Need - The library has determined what the community's programming needs are, including types, formats (on site, in the community, and/or online) and age levels. The library offers programs to the community as appropriate, either alone or in conjunction with other organizations (e.g. story hour for pre-school children; reading clubs; social networking activities, lectures; demonstrations; author readings).				
	10.2	Programming Plan - The library has developed a programming plan which is informed by community programming needs, the availability of other partner programs or community services and reflects current trends or recognized public library best practices.				Example: Blue Mountains Public Library
	10.3	Formal Evaluation Process - The library follows a formal process for evaluating library programming and initiatives which will inform the library programming plan on potential successes or failures to encourage continued growth within the public library.				Example: Blue Mountains Public Library
Section 11 Planning for Technology						
	11.1	Technology Plan - The library has in place a plan which reflects defined goals, objectives and/or action plans for the acquisition, service, maintenance, upgrade and replacement of electronic networks, equipment and software applications for both staff and patron use. The plan considers the library's existing technology, technology potential, and the impact of future trends on library services. It includes strategies for funding, staffing, training and technology support as required.	M			Example: Blue Mountains Public Library
	11.2	New Trends and Emerging Technology - The library demonstrates an interest in new trends and emerging technology through research, studies or the				Example: Blue Mountains Public Library

		application of emerging technologies in their programming, services or staff training.				
	11.3	Inventory - The library has an up-to-date inventory of its technology equipment and software licenses and has a schedule for inventory-taking and updating, at minimum once a year.				Example: Blue Mountains Public Library
	11.4	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 as set out in its technology plan.				Example: Blue Mountains Public Library
	11.5	Disaster Recovery Procedure - 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, flood, theft or fire damage). A procedure establishes how the library will maintain essential technology 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. The business continuity and disaster plan may be part of the overall library or municipal continuity and disaster plan but must have library specific information.				Example: Blue Mountains Public Library
			8	25	0	
		Actual				
		Percentage (All Mandatory required; 90% of total statements required)				

LEVEL-SYSTEM *[One form per system]*

Area III: Policy

For policies on personnel and governance, see Areas I and Area IV

Section/Topic	#	Item	M	Y/N	N/A	Comments/Notes
Section 12 Safety, Security & Emergencies	12.1	Safety, Security and Emergencies Policy - The governing body is responsible for providing a safe and secure environment for library staff and for members of the public who use public library services. The library maintains a policy that addresses safety, security, and emergency issues.	M			Example: Trillium Public Library
	12.2	Working Alone - The library maintains policy pertaining to staff and volunteers who work alone in the library or other designated sites.	M			Example: Blue Mountains Public Library
	12.3	Workplace Violence - The library maintains policy that adheres to relevant provincial and/or federal legislation on workplace violence and sexual violence.	M			Example: Trillium Public Library
	12.4	Harassment - The library maintains policy that adheres to relevant provincial and/or federal legislation on harassment and sexual harassment.	M			Example: Trillium Public Library
	12.5	Code of Behaviour - The library maintains policy that informs patrons regarding reasonable behaviour when accessing library services and sets out consequences when these behaviours are not met.				Examples: Trillium Public Library , Blue Mountains Public Library
	Section 13 Collection & Circulation	13.1	Collection Policy - The library maintains a policy concerning the library's collection which includes the responsibility for collection development and selection; selection criteria; weeding; disposition of gifts; complaints about the collection; and organization of the collection.	M		
13.2		Intellectual Freedom - The library's collection development policy includes an Intellectual Freedom statement which could be one developed by a recognized library association or developed by the library itself.	M			Example: Trillium Public Library
13.3		Circulation Policy - The governing body maintains policy governing the circulation of library materials which includes 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			Example: Trillium Public Library
13.4		Privacy and Access to Personal Information Policy - The library maintains a policy which addresses the retention, security, release, and storage of patron information in various formats according to applicable federal and provincial legislation. The policy should include how requests for information from individuals, law enforcement and other authorities are to be addressed by library staff (<i>Related procedures are in 18.7</i>).	M			* Note - MFIPPA Privacy that applies specifically to the public library. Example: Trillium Public Library

Service Policies	14.1	Reference and Information Policy - The library maintains a policy governing the provision of reference and information service, which includes: members of the staff who are responsible for providing reference and information service; accessibility of information for persons with disabilities; limits to assistance provided; how telephone, fax, online, email and other electronic requests are handled; 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			Examples: Trillium Public Library , Blue Mountains Public Library
	14.2	Accessibility for Ontarians with Disabilities Library Statement - The library has established a statement outlining their commitment to meet the accessibility needs of persons with disabilities.	M			Example: Trillium Public Library
	14.3	Children’s Services Policy - The library maintains a policy governing the provision of children’s services, which addresses issues such as: supervision; unattended children; accessibility for children with disabilities; access to the adult collection; the library’s relationship with local schools; and an endorsement of Ontario Library Association’s Children’s Rights in the Public Library statement.				Examples: Trillium Public Library , Blue Mountains Public Library
	14.4	Teen and/or YA Policy - The library maintains a policy governing the provision of teen / YA services, which addresses issues such as: accessibility for young adults with disabilities, the library’s relationship with local schools and an endorsement of OLA’s Teens’ Rights in the Public Library statement.				Example: Trillium Public Library
	14.5	Programming Policy - The library maintains policies and/or procedures which address issues such as: what types of programs are to be provided to what parts of the community; who is responsible for developing and running programs; how partners interact with the library; and whether charges should be made for participating in programs.	M			Examples: Trillium Public Library , Blue Mountains Public Library
	14.6	Community Information Policy - The library maintains a policy to address the provision of community information.				Examples: Trillium Public Library , Blue Mountains Public Library
	14.7	Local History Policy - The library maintains a policy inclusive of its community and territory history that includes: inclusive types of local history materials collected; genealogy collections and their circulation status; geographic area covered; techniques or methods used for materials preservation or digitization; and public access of the materials in the collection or archived by the library or library partners in the community. Policy should recognize that some collection material may have a historical colonial perspective. Local history collections should be developed to recognize all peoples who live or				Example: Trillium Public Library

	<p>have lived in the library’s community and territory. They should reflect respect for, and reconciliation, with Indigenous people.</p> <p><i>The above is recommended as a dedicated Local History Policy. The subject may also be addressed in other policies when the library is a local history partner and a First Nation, municipal, county archives or other heritage organization is the main source of local history material.</i></p>				
14.8	<p>Public Meeting Room Policy - The library maintains a policy which includes: accessibility; 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. If your library does not provide meeting space, you may receive a ‘not applicable’ here.</p>				Example: Trillium Public Library
14.9	<p>Resource Sharing Policy - The library maintains a policy which addresses: lending of materials to other libraries, including the type of materials it is prepared to lend and the length of time for which materials will be lent.</p>				Example: Trillium Public Library
14.10	<p>Indigenous Awareness and Reconciliation - The public library recognizes and embraces the principles of Truth and Reconciliation with Ontario’s diverse Indigenous population. The library engages in meaningful dialogue with Indigenous people and First Nation bands. In cases where local Indigenous people and First Nation bands prefer to engage in dialogue with the municipality and not the library, the library stays informed and is available as a supportive resource and partner. Resources available to the public library include meaningful dialogue with Indigenous people and First Nation bands as well as resources and strategies developed by the Canadian and International library community. The library sector acknowledges its need to recognize and embrace the principles of Truth and Reconciliation with Ontario’s diverse Indigenous populations.</p> <p>Subject to the frameworks developed by the library sector, as updated and inclusive of dialogue with Indigenous people, three elements should be included in each Library’s policy documents.</p> <ol style="list-style-type: none"> 1) a statement that endorses a Respect and Land Acknowledgement Declaration for original Indigenous peoples; 2) a collection development policy statement that addresses the value of Indigenous collection materials and enables Indigenous authors and content creators to be included and highlighted; 3) a policy statement that highlights the provision of library services for Indigenous people and that can include plans or policies to partner with Indigenous people and their communities 	M			Examples: Trillium Public Library , Blue Mountains Public Library

		<i>The above is recommended as a dedicated Indigenous Awareness and Reconciliation policy. It can also be included in other policies. Recommended resources to inform this policy includes input and reports from The Indigenous Task Group of the Ontario Library Association, the Truth and Reconciliation Committee of the Canadian Federation of Library Associations and ongoing meaningful dialogue with Indigenous people and First Nation bands.</i>				
	14.11	<p>Diversity - The public library recognizes and embraces the diverse nature of every Ontario community. The Library's governing body endorses a statement on diversity and includes that the library has:</p> <ol style="list-style-type: none"> 1) assessed the barriers to accessing its services through an inclusion lens; 2) created a collection development policy statement regarding the inclusion of diverse materials that enables a broad range of authors, content creators, and experiences to be included and highlighted; 3) and actively promotes collections and services of a diverse nature. <p><i>The above is recommended as a dedicated Diversity and Inclusion Policy. It can also be included in other policies.</i></p>	M			
SECTION 15 Use of Technology						
	15.1	Free Access to Public Computers Policy - The library has established and adopted a policy that addresses criteria rules and regulations for free public access to library devices and/or computers.	M			Examples: Trillium Public Library , Blue Mountains Public Library
	15.2	Acceptable Use of the Library's Electronic Systems - The library has established and adopted a policy which defines acceptable use of the internet, software, and application. This policy will address issues such as downloading, copyright infringement, and illegal activities be they on library infrastructure or personal devices.	M			Example: Fort Frances Public Library
	15.3	Internet Filtering and Control of Information Statement - The library has formally addressed via a written statement on its position on filtering and control of electronic information via online and internet resources in their public library. This statement is made available to patrons and guardians to inform them of library policy.	M			
	15.4	Staff Use of Technology — The library has established and adopted a policy on staff and volunteer use of technology. This will include descriptions of both staff expectations and personal use of library equipment and resources.				Examples: Trillium Public Library , Blue Mountains Public Library
			16	25	2	
		Actual				
		Percentage (All Mandatory required; 90% of total statements required)				

LEVEL-SYSTEM [One form per system]

Area IV: PERSONNEL & HUMAN RESOURCES

Section/Topic	#	Item	M		N/A	Comments/Notes
Section 16 Human Resources	16.1	Personnel Policy - The library maintains written personnel management policies which address: 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 municipal policy or collective agreement that the governing body has adopted.)	M			
	16.2	Distribution of Policy - Every employee of the library has access to a copy of the personnel policy and/or collective agreement.	M			
	16.3	Job Descriptions - Job descriptions are reviewed annually and updated as required (e.g. as part of the performance evaluation process).	M			
	16.4	Salary Scales - A current salary scale/pay grid has been established for each job category and is readily available to staff.	M			
	16.5	Paid Staff - The governing body employs one or more permanent paid staff.	M			PROFILE The library's current FTE per capita is _____.- (see <i>Introduction & Resource materials</i> Appendix 2)
	16.6	Staffing - The library has a process for regularly assessing the number of staff required to meet community needs.				
	16.7	Administrative Hours - To meet administrative, management and service preparation duties, staff are provided with paid time outside of hours devoted to working with the public.				
	16.8	Volunteers Policy - The library maintains policies which address: types of tasks to be performed, differentiation of paid and unpaid tasks (in the case of collective agreements), enlistment of volunteers, retention of volunteers, and how volunteers fit into the overall operation of the library.	M			
Section 17 Evaluation and Training	17.1	Performance Appraisal - Performance evaluation is a formal opportunity for employees and supervisors to review and evaluate the employee's work performance. A formal, written, performance evaluation of each employee is carried out on a regular and ongoing basis (e.g. - annual basis). <i>Libraries with only one employee, who is also the CEO, will receive an N/A.</i>	M			Examples: Fort Frances Public Library , Blue Mountains Public Library

	17.2	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			Example: Fort Frances Public Library
	17.3	Level of Training - The person managing the library services has completed, or currently undertaking, formal library education which is appropriate to the needs of the community and to the complexity of the library operation and will be from one of the following: <ul style="list-style-type: none"> 1. Master of Library & Information Science (MLIS) or equivalent 2. College Diploma in Library Techniques 3. Excel Certification 4. Advancing Public Library Leadership (APLL) 	M			
	17.4	Continuing Education and Training - The library encourages continuing education and training for its staff and makes provision for all training expenses in its policy, its long-range plan, and in its budget to an amount not less than 1% of its total wages and benefits.				
	17.5	Reference and Information Service - Designated library staff receive training to provide answers to queries and requests for information posed by library users.	M			
	17.6	Staff Training in Technology Use - Library staff receive training in how to use library equipment and software applications and to assist the public in how to use equipment, applications, complete troubleshooting, and assess and report technology problems. Additionally, staff receive training in implementing technology policies and related procedures (e.g. privacy and access to information; business continuity).	M			
	17.7	Technical Support - The library has access to an IT professional that can provide skilled technical support for installing, maintaining and repairing library technology.				
	17.8	AODA Customer Service - All staff have completed the specific customer service training required under the Accessibility for Ontarians with Disabilities (AODA) legislation.	M			
Section 18 Staff Procedures	18.1	Safety, Security and Emergencies Procedures - The library has written, site specific emergency procedures for each location (e.g. physical plant emergencies, health emergencies, pandemics, evacuation plans, bomb threats, evacuation procedures to assist people with disabilities).	M			Example: Fort Frances Public Library
	18.2	Emergency Procedures Training - Staff have been trained on the site-specific emergency procedures in order to protect themselves and patrons. (e.g.				Example: Fort Frances Public Library

		medical emergency, weather closures, lock down, bomb threats, missing child, emergency evacuations, and evacuation procedures to assist people with disabilities).				
	18.3	Working Alone - The library has procedures which reflect site specific legislative compliant details, regarding working alone in the library or other designated sites. (e.g. opening and closing the library, emergency situations).	M			Example: Blue Mountains Public Library
	18.4	Workplace Violence - The library has a site specific program in place that adheres to relevant provincial and/or federal legislation on workplace violence.	M			Example: Blue Mountains Public Library
	18.5	Harassment - The library has a program that adheres to relevant provincial and/or federal legislation on harassment.	M			Example: Blue Mountains Public Library
	18.6	Sexual Violence and Harassment in the Workplace - The library has a program that adheres to relevant provincial and/or federal legislation on harassment.	M			
	18.7	Privacy and Access to Information - The library has procedures in place for the collection, access, use and disposal of personal data in various formats that adheres to relevant provincial and/or federal legislation on privacy and access to information. (<i>Relevant policy is found at 13.4</i>).	M			
			18	23	1	
		Actual				
		Percentage (All Mandatory required; 90% of total statements required)				

LEVEL-SYSTEM *[One form per system]*

Area V: General

Section/Topic	#	Item	M		N/A	Comments/Notes
Section 19 Library	19.1	Distance - Persons in the community are required to travel less than forty-five (45) minutes to the nearest stationary, mobile, or multi-branch public library service point.				
	19.2	Phone Number - The library has at least one line dedicated to telephone use, with a number listed under the library's name.	M			
	19.3	Information about Library Programs - Information about library programs, services, rules and hours is made easily available to residents in print and on the library's web site, in the appropriate language(s). Some examples of information provision could include print material(s), links from other appropriate web sites or social media, or that of the municipality or First Nation band, including regular articles or advertisements in the local media.				
Section 20 Access to Services	20.1	Materials Delivery Service - The library provides materials on an organized and regular basis to self-identified residents of the community who are unable to travel to the library (e.g. the housebound, residents of institutions such as prisons or nursing homes).				
	20.2	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 Internet (e.g. electronic collections; provision of online forms; online and telephone reference services).				
Section 21 Collection Management	21.1	Acquisitions - 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.	M			
	21.2	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.				Example: Blue Mountains Public Library
	21.3	Holds - The library offers a "reserves or holds" 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				Example: Blue Mountains Public Library

		use.				
	21.4	Integrated Library System - The library has an ILS with remote searchability.	M			
	21.5	Bibliographic Records - The library has procedures and schedules for adding and modifying records.				
Section 22						
Co-operation and Partnerships						
	22.1	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, and advocate groups).				
	22.2	Library Sector Partnerships - To strengthen and enhance service to its users, the library participates with library and information organizations beyond its own community; for example, by being an active member in regional, cooperative organizations (e.g. the Federation of Ontario Public Libraries, the Ontario Library Consortium, the Information Network for Ontario), and by participating in Ontario Library Service and Ontario Library Association committees.				
	22.3	Partnerships Beyond your Community - The library partners with organizations beyond its own community to provide training for its staff, or to enhance the library's efficiency in service delivery, library promotion, programming, administration, and communications. For example, several Ontario projects have demonstrated that diverse technology projects can become cost-effective through partnership (e.g. regional health and wellness strategy partner; regional newcomer partner).				
	22.4	Interlibrary Loan Service - The library will borrow materials from other libraries (e.g. Interlibrary loan service) through the province-wide resource-sharing system, INFO. The library promotes this service (e.g. through appropriate signage, brochures, information on the library website etc.).	M			
	22.5	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).				
	22.6	ILS Cooperation - The library participates in an ILS cooperative or consortium as a cost-savings measure.				
Section 23						
Library						
	23.1	Library Website - The library has its own website or has web pages within the municipality's website; and has the ability to alter content on this site. The	M			

Website and Web-based Services		website has been designed according to a clear plan which follows appropriate web protocols and/or standards. Website visitors can navigate easily to the information or function they require. Where the library's website is part of the municipality's website, the library pages are conveniently signposted from the site's landing page.				
	23.2	Accessible Website - The library website meets appropriate standards for access by people with a disability (e.g. The Web Accessibility Initiative standards)				
	23.3	Websites for Specific User Groups - The library has sections of the website, or additional webpages for one or more specific user groups such as children, young adults, and significant cultural or linguistic populations in the community.				
	23.4	Library Information - The website includes up-to-date information about the library, such as library services, locations, programs, hours, telephone/email, membership, governance body information, contact information, policies relevant to public library use and library forms (e.g. membership forms, user agreements for Internet use, etc.).	M			
	23.5	Library Collections - The website has up-to-date information about the library's collections. It may have information on the various collections in the library, highlights about new titles, and information on the electronic databases/e-resources as well as links to reading guides.				
	23.6	Reference and Information Services - The library website provides access to at least one current electronic information resource or database (e.g. Canadian Encyclopedia), and access to this service is properly promoted.				
	23.7	Online Reference and Information Inquiries - Through the website, visitors can email staff or initiate live chat to access the library's reference services. The website lists the times the online chat service is available, and the timeframe for responding to emails.	M			
	23.8	Interactive Services - The library has addressed social media and/or mobile technology in its various planning processes.				
			7	24	0	
		Actual				
		Percentage (All Mandatory required; 90% of total statements required)				

LEVEL-ON SITE OBSERVATIONS *[One form per branch/location]*

Area VI: Collections and Services

Section/Topic	#	Item	M		N/A	Comments/Notes
Section 24 Collections	24.1	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.				
	24.2	Online Collection - The library has an online collection of books and other materials which may be borrowed / downloaded by registered members for a specified period.				
	24.3	Labeling - Items in the collection are labeled in a way that is consistent and facilitates ease of access by the public and staff (e.g. with labeling 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).				
	24.4	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.				
	24.5	ILS Records - The library has procedures and schedules for purging outdated records such as missing materials, and members who have been inactive for two years or more.				
	24.6	Reference Resources - The library provides current vetted and authoritative materials dedicated to information retrieval by library users and staff in the appropriate language(s). These materials can be in physical and/or online format.	M			
	24.7	Advisory Aids - For the convenience and guidance of all 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, special displays, links or bookmarks to web content, etc.).				
	24.8	Children's Collection - The library provides a collection of library materials which is designated primarily for use by children or their caregivers.				
	24.9	Early Literacy - The library has collections and programs to support the development of early literacy and learning.				
	24.10	Teen / YA collection - The library provides a collection of materials which is designated primarily for use by teens / YA and designed to appeal to the changing reading levels, interests and information needs of this group.	M			

	24.11	Collections: Language - Where appropriate, the library provides a collection of library materials which is designated primarily for use by linguistic, cultural and newcomer groups within the community.				
	24.12	Alternative formats - The library provides materials in alternative formats (e.g. large print publications, talking books, closed-captioning and descriptive videos), ensuring access to its services and resources for all users. The library supplies access to library publications such as governance body minutes, brochures or other documents in alternate formats on request.				
Section 25 Services	25.1	General Public (a) - The library offers reference and information services to the general public.	M			
	25.2	General Public (b) - The library offers readers advisory services to the general public.	M			
	25.3	General Public (c) - The library offers community information referral services to the public.	M			
	25.4	General Public (d) - The library offers programming to the general public.	M			
	25.5	Seniors (a) - The library offers reference and information services and/or community referral to seniors in the community.				
	25.6	Seniors (b) - The library offers readers' advisory services to seniors in the community.				
	25.7	Seniors (c) - The library offers programming for seniors in the community.				
	25.8	Teens (a) - The library offers reference and information services and/or community referral to teens in the community.				
	25.9	Teens (b) - The library offers readers' advisory services to teens .				
	25.10	Teens (c) - The library offers programming for teens in the community.				
	25.11	Children (a) - The library offers reference and information services and/or community referral to children in the community.				
	25.12	Children (b) - The library offers readers' advisory services to children in the community.				
	25.13	Children (c) - The library offers programming for children in the community.				
	25.14	Optional (a) - The library offers specialized programs or service for cultural/linguistic groups in the community (other than English or French).			N/A	Do not score – open comments
	25.15	Optional (b) - The library offers language materials for cultural/linguistic groups in the community (other than the official languages of English or French).			N/A	Do not score – open comments
25.16	Optional (c) - The library offers specialized programs or service for LGBTQ+ groups in the community.			N/A	Do not score – open comments Example: Blue Mountains Public Library	

	25.17	Optional (d) - The library offers specialized programs or service for newcomers in the community.			N/A	Do not score – open comments
	25.18	Optional (e) - The library offers specialized programs or service for socio-economically disadvantaged groups in the community (e.g. job search, homeless, ESL).			N/A	Do not score – open comments
Section 26 Technology Services	26.1	Internet Connectivity - The library is connected to the Internet with a minimum bandwidth (upload/download speeds) as set by the CRTC standards. OR If not meeting the above standard, provide evidence that the library is connected to the Internet with the best speed/bandwidth available in the community.	M			
	26.2	Public Internet Access - The library provides free use of the Internet to meet the needs of their community and guests.	M			
	26.3	Wireless Networks - The library has Wi-Fi for public and staff access.				
	26.4	Software Applications for Public Use - The library provides software to the public, such as word processing, spreadsheet, presentation software, etc.				
	26.5	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.				
	26.6	Software Applications for Staff Use - The library has office or web applications for staff use such as word-processing, spreadsheets. It may have additional applications that contribute to the library's administrative efficiency (e.g. financial, desktop publishing, training software).				
	26.7	E-mail - Staff have access to a library (or municipal, band, county, etc.) e-mail system for the purposes of sending and receiving work-related emails, responding to information requests and enquiries, or other communication needs.	M			
	26.8	Alternate Communication Techniques - The library provides alternate communication methods for the public to communicate with staff (e.g. SMS, text, blog, Facebook messenger, etc.).				
	26.9	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			
				10	34	5*
		Actual				
		Percentage (All Mandatory required; 90% of total statements required)				

LEVEL- ON SITE OBSERVATIONS *[One form per branch/location]*

Area VII: Physical & Facilities

Section/Topic	#	Item	M		N/A	Comments/Notes
Section 27 Looking at the exterior						
	27.1	Minimum Hours - The main library service outlet is open to the public at least 20 hours per week. In the case of multi-branch library systems, branches are open a minimum of 12 hours per week. Open to the public could include curbside service during the COVID-19 pandemic.	M			
	27.2	Visibility of Signage - Library buildings are clearly identified by exterior signs which are highly visible from the street and in the appropriate language(s).				
	27.3	Posting of Hours - Library hours are posted and visible from the exterior of the service outlet.				
	27.4	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); OR Provides proof indicating they have made a request to the government responsible for the road signage to have these signs placed in the community.				
	27.5	Parking - Adequate and convenient parking is available at or near the branch including AODA standard parking space(s).				
	27.6	Return of Materials - The library provides an identifiable location for the secure return of library materials during regular service hours and when the library is closed (e.g. book drop).	M			
Section 28 Spaces within the library						
	28.1	Areas of the Library - Distinct areas of the library are designated or readily adaptable for various services and functions (e.g. adult services, children’s services, library staff work and rest, storage, etc.).				
	28.2	Physical Layout - The physical layout of the library is organized in a way that is systematic, easy to navigate, and convenient for users.				
	28.3	Interior Signage - Areas of the library, specific services and parts of the collection are clearly identified by appropriate signage, in language(s) used by major linguistic groups in the community.				
	28.4	Adult Shelving - Materials in open stacks should be stored at heights appropriate to their primary users. At least 75% of the materials in collections are stored in such a way that the bases of the tallest books are at the				

		<p>following height:</p> <ul style="list-style-type: none"> Adult: Maximum Height 60 inches or less <p>Note: recommendation to maintain the bottom of the lowest shelf no less than 8 inches from the floor OR angled to maximize readability.</p>				
	28.5	<p>Children's Shelving - Materials in open stacks should be stored at heights appropriate to their primary users. At least 75% of the materials in collections are stored in such a way that the base of the tallest books are at the following height:</p> <ul style="list-style-type: none"> Children's: Maximum Height 48 inches or less 				
	28.6	<p>Shelving Capacity - The amount of shelving is sufficient to store and display most materials without overcrowding.</p>				
	28.7	<p>Accessible Workstation Furniture - Convenient access to the library equipment is provided for all, with suitable adjustable workstation heights provided for those with disabilities and also for children.</p>				
	28.8	<p>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) or function (e.g. computer, maker space, etc.)</p>				
	28.9	<p>Climate Control - The library provides climate control for the comfort, and safety of the public and staff, and for the protection of assets.</p>				
	28.10	<p>Interior Lighting - Lighting levels are adequate in all areas (e.g. in collection areas, general reading and staff areas, computer stations, reading tables) - please see "Aids to Measurement".</p>				
	28.11	<p>Environmental Awareness - Wherever possible, the library adopts visible practices (e.g. recycling, double sided printing, battery recycling, diverting withdrawals from landfill, LEED initiatives) that adhere to sustainable guidelines.</p>				
	28.12	<p>User Space (Seating) - The library provides seating for use of library services and materials by the public on library premises. (e.g. - leisure reading, computer use, as well as table space and/or carrels for study purposes and consultation of library materials).</p>				<p>PROFILE The library's current user capacity is _____ user spaces. -(see <i>Introduction & Resource materials Appendix 2</i>)</p>
Section 29 Access within the library						
	29.1	<p>Public Washroom(s) - Washroom(s) are available for public use.</p>	M			
	29.2	<p>Accessible Washrooms - Washroom(s) are compliant with current legislation.</p>				
	29.3	<p>Gender Neutral Washrooms - Gender-neutral washroom(s) are available for public use.</p>				
	29.4	<p>Entrance - The library provides an accessible entrance.</p>				
	29.5	<p>Aisles - Space between book stacks is no less than 36 inches.</p>				
	29.6	<p>Clear access -Access to user areas and library materials is clear and</p>				

		unobstructed.				
	29.7	Assistive Technology - The library provides assistive technology (e.g. magnification devices or software, keyboards with raised letters, large screen monitors, screen reading software, etc.).				
	29.8	Multiple-Floor Structures - Where the public area of the library/branch occupies more than one level, wheelchair access is provided between levels. For staff, a work accommodation has been provided for a multistory facility.				
Section 30 Safety considerations within the library						
	30.1	Emergency Procedures – Each library location has distinct onsite specific written emergency procedures in place (e.g. Physical plant emergencies, health emergencies, pandemics, evacuation plans, bomb threats, evacuation procedures to assist people with disabilities, muster stations).	M			
	30.2	Emergency Equipment & Facilities - The library provides emergency equipment in accordance with appropriate legislation (e.g. smoke and fire alarms; emergency lighting; as well as evacuation routes; fire extinguishers; Automated External Defibrillator (AED); emergency first aid supplies).	M			
	30.3	Supervision - All areas of the library open to the public are supervised by library staff, with clear lines of sight or measures to address structural or facility challenges which can include video supervision, mirrors or roving staff procedures viewable from all staff work areas.				
	30.4	Exterior Lighting - The library entrance, staff entrance, and parking area are clearly illuminated at night.				
			5	30	1	
		Actual				
		Percentage (All Mandatory required; 90% of total statements required)				