

## **MINUTES (Approved 26 April, 2007)**

### **Ontario Public Library Guidelines and Accreditation Council Teleconference Meeting, March 7, 2007, 10:00 AM**

**Present:** Elise Cole (OLA) – Chair, Margaret Williams (AMPLO), John Slater (OLS-N), Peggy Malcolm (SOLS), Margaret Rule (ARUPLO), Rod Sawyer (MCL), Nancy Leindecker (Northern Ontario)

**Regrets:** Leanne Clendening (Ex officio), Marzio Apolloni (FOPL), Shann Leighton (Small Libraries)

#### **1. Welcome/Call to order**

The meeting began at 10:05 AM.

#### **2. Adoption of agenda**

**Motion 08-07: John Slater / Margaret Williams**

**"That the draft agenda be adopted as amended."**

**CARRIED**

#### **3. Minutes of the meeting of January 12<sup>th</sup>, 2007**

**Motion 09-07: Margaret Rule / John Slater**

**"That the minutes of January 12th, 2007 be approved as read."**

**CARRIED**

#### **4. Matters arising**

##### **a) OLA Conference – Certificate presentations and luncheon**

Elise, Rod and Marg Rule reported that the certificate presentations went especially smoothly this year and were very well organized. In particular, having recipients sitting at tables near the front of the room helped to speed up the process.

Peggy suggested that a short organizational checklist for the event be developed for use next year. Elise agreed to join Peggy in working on this.

Elise will send a copy of her introductory address to John to be added to the files.

The informal luncheon get-together at Joe Badali's was reported to be very pleasant.

NOTE: Nancy Leindecker joined the meeting at 10:25

**b) Review of the revised sections: 'Title', 'Introduction' and 'How the guidelines may be used'**

John presented the following draft revision based on changes agreed to at the last meeting. Additional changes were agreed to. The sections now read as follows:

Title Section:

Ontario Public Library Guidelines

Fourth Edition

Municipal and County Public Libraries

***Editorial Team***

ADMINISTRATORS OF MEDIUM PUBLIC LIBRARIES OF ONTARIO

*Representative:* Margaret Williams

ADMINISTRATORS OF RURAL/URBAN PUBLIC LIBRARIES OF ONTARIO

*Representative:* Margaret Rule

FEDERATION OF ONTARIO PUBLIC LIBRARIES

*Representative:* Marzio Apolloni

ONTARIO LIBRARY ASSOCIATION

*Representative:* Elise Cole

ONTARIO LIBRARY SERVICE-NORTH

*Representative:* John Slater

ONTARIO MINISTRY OF CULTURE

*Representative:* Rod Sawyer

SOUTHERN ONTARIO LIBRARY SERVICE

*Representative:* Peggy Malcolm

NORTHERN ONTARIO PUBLIC LIBRARIES

*Representative:* Nancy Leindecker

SMALL PUBLIC LIBRARIES

*Representative:* Shann Leighton

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## **Background**

*Ontario Public Library Guidelines* was first published in 1997 as a developmental tool for small, medium and county libraries. It represented the final report of a working group appointed by the **now dissolved** Ontario Public Libraries Strategic Directions Council. The working group was set up to respond to a number of recommendations contained in *One Place to Look*, the *Ontario Public Library Strategic Plan 1990*. Following publication of the report, and several months of testing the *Guidelines* in local libraries, the SDC established the Ontario Public Library Guidelines Monitoring and Accreditation Council (Guidelines Council).

One of the responsibilities of the Guidelines Council is to "monitor the continuing effectiveness of the *Guidelines* and make revisions as required". A second edition of the *Ontario Public Library Guidelines* was therefore published in 1999 **and a third edition in 2003**. The revisions in the **revised** editions reflect both experience in using the *Guidelines* in libraries over the **past several** years as well as changes in the **day-to-day** working **situation** of libraries.

This **fourth** edition represents an on-going process of refining the *Guidelines*, removing parts that are no longer relevant and making additions where necessary to **reflect** the ever changing environment in which libraries operate today.

Introduction Section:

### ***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.

### **➤ *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 recent dissolution of the SDC, the Guidelines Council reports to the Federation of Ontario Public Libraries (FOPL).** 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. (For a current list of members, go to: [http://www.olsn.ca/Guidelines/Opl\\_guidelines.htm](http://www.olsn.ca/Guidelines/Opl_guidelines.htm) )**

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 **Joint OLS-North/SOLS on-line Clearinghouse ( <http://www.sols.org/links/clearinghouse/index.htm> )**, 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 already provides consulting services and administers the Excel training program. **A variety of training opportunities are provided by** Ontario Library Service-North, Southern Ontario Library Service 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.

How the Guidelines May be Used Section:

## ***II. How the Guidelines may be used***

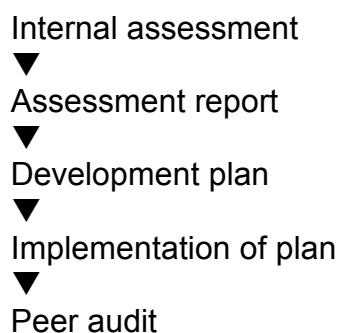
### **A. Application of Guidelines**

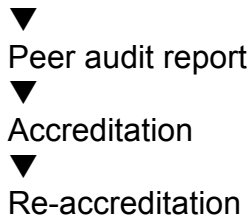
Application of the *Guidelines* is voluntary. They may be used either for internal purposes only, or with the involvement of external resource persons in a process that may lead to the library being accredited.

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. (See Appendix E.) 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 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 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.

### **Motion 10-07: Rod Sawyer / Margaret Rule**

**"That, in the Fourth Edition of the OPL Guidelines, the 'Title', 'Introduction' and 'How the Guidelines May Be Used' sections be amended as shown."**

**CARRIED**

#### **c) Review of the appendices**

Drafts of the following revised appendices were discussed:

Appendix A – Support and Resources

Appendix B – Aids to Measurement

Appendix C – Core Reference Tools

Appendix D – Meeting the Community Analysis Requirements of the OPL Guidelines

Peggy and John will bring revised drafts of the appendices based on these discussions to the next meeting for review.

#### **d) Up-dated testimonials**

Brief testimonial statements, for inclusion as sidebars in the introductory section of the fourth edition, have been received from Sandra Weitzel (Dryden), Deb Jackson (Haldimand), Cindy Weir (Innisfil) and Shann Leighton (Grand Valley).

Margaret Williams and Marg Rule also have agreed to submit testimonials.

It was suggested that it would be beneficial to include testimonials from libraries that are not accredited but which make use of the Guidelines internally. Marg Rule will make a request for testimonials at the next ARUPLO meeting, as will Nancy at the OLS-North Librarians' Advisory Committee meeting in May.

#### **e) OPL Guidelines Council Terms of Reference**

Deferred to the next meeting as Marzio is absent.

### **5. Other Business**

a) Peggy forwarded the following comments from Lauey Gillies, CEO of SOLS, concerning mandatory guidelines:

- 1) "I am surprised to realize that the Guidelines do not have a minimum of EXCEL as a mandatory level of training for the CEO. I expect the Council has discussed this. What were the reasons for not making it mandatory? In my reading of the Guidelines, there is no mandatory requirement to have any library training. Yet the skills of library staff are fundamental to library service and we provide an excellent and accessible vehicle in EXCEL.
- 2) ... a couple of other items that seem odd to me. Why would access to electronic resources not be mandatory? The connectivity fund (to assist with Internet public access 4.2.4) and the databases through Knowledge Ontario (Electronic reference resources 3.3.7 and 3.3.8) make this possible for all libraries.

Council will consider these comments at its next meeting.

### **6. Next Meeting**

The next regular teleconference meeting has been scheduled for Thursday, April 26 at 2:00PM.

NOTE: At its next meeting Council will review the revised appendices for the Fourth Edition, as well as the current revised Checklist.

### **7. Adjournment**

The meeting ended at 11:20 AM.