



# **Standards & Best Practices For Public Libraries in Alberta**

*(Picture on Cover: Big Valley Municipal Library)*

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# Introduction and Process

## Need for standards

Public library service in Alberta is delivered by 231 municipal and library system boards. They operate 312 public library service points in large urban municipalities and small rural communities. The boards often request information on basic service standards and best practices in order to compare their library with those of similar size.

The need for this information has also been identified by the system directors in their document *Standards for Member Libraries within Alberta's Regional Library Systems (2003)* and acknowledged in Recommendations #3 and #8 of the MLA Committee report *Framework for the Future: Positioning Alberta Libraries for the 21<sup>st</sup> Century (2009)*.

These standards and best practices:

- address equity in delivery of library services for residents of Alberta
- provide a point of reference for self-evaluation
- provide a framework for future development
- support change in policy, technology and formats of materials
- encourage cooperation
- support and guide library boards and staff
- inform boards and municipalities
- encourage excellence in library service

This document contains three sections:

## Part 1 - Standards

The *Libraries Act* and *Libraries Regulation* (amended last in 2006):

- establish the legal infrastructure for the provision of service at the municipal, intermunicipal, federation and system levels
- set legal standards for municipal library boards
- provide for municipalities to cooperate to provide service on a regional basis and for library boards to cooperate, collaborate and enter agreements for service

Compliance to standards, which is monitored by the Public Library Services Branch, is mandatory. Library boards must comply with standards to receive provincial operating funds. The standards require: written bylaws, a plan of service, written policies, reports to the Minister and municipal council, a written budget and estimate of funds, financial reporting, a professional librarian (contingent on population size), agreements in place, governance structure and hours of opening (school-housed).

## Part 2 - Best Practices

This section identifies two levels of service, *essential* and *exemplary*. Library boards determine which level will be provided.

Needs assessments and community considerations influence this decision:

- *Essential* service levels fulfill those requirements absolutely necessary to provide basic library service
- *Exemplary* service offers recommendations/suggestions to enhance the basic elements and to strive for outstanding library service.

The areas of best practices include:

- governance
- collaboration
- plan of service
- personnel
- collection management
- information services
- resource-sharing
- technology
- hours of opening
- facilities

These best practices do not represent standards required by the province. They provide choices that each board can consider in whether to go beyond the status quo, while taking into account the community's expectations, sustainability and growth.

Each local library board is responsible for determining the metrics and the measure of their success.

### **Part 3 - Appendices**

The third section combines examples of required agreements that can be used by boards. It also includes comparative statistics of libraries by population using the 2008 Public Library Statistics to demonstrate actual sizes of collections, facilities and number of hours open. Library boards and staff can use these figures for comparative analysis, budget forecasting, and identification of goals and objectives. This section will be revised and expanded annually using current statistics.



## Committee

The Public Library Services Branch of Alberta Municipal Affairs established a committee of library practitioners to collect and review standards and best practices, including information on the infrastructure required to provide a full range of 21<sup>st</sup> century library services:

## Members

Carol Downing	Peace Library System
Dyan Perley	The Alberta Library
Janine Jevne	Airdrie Public Library
Kenneth Allan	Vegreville Centennial Library
Lauren De Bruin	The Alberta Library
Patricia McNamee	Public Library Services Branch, Alberta Municipal Affairs
Robert Zylstra	Yellowhead Regional Library System
Stephanie Thero	Yellowhead Regional Library System
Susan Grieshaber- Otto	Parkland Regional Library System
Terra Plato	Chinook Arch Regional Library System

## Process

The committee began meeting in the fall of 2009 to develop its plan of action and to draft the standards and best practices prior to presenting them to the library community and Municipal Affairs. The committee also asked for feedback from the library systems, node directors, large and small libraries, and library managers.

This is an evolving document. These standards must be reviewed and revised to reflect the changing social, political and economic environment at least every five years. Future revisions are inevitable, and additions of best practices and comparative statistics will be appended.

The committee brought many years of experience and knowledge to this document and would like to express its appreciation for the tremendous work carried out by library boards and staff in Alberta. The research carried out by the committee was extensive (see Additional Resources). Of special note the committee would like to highlight the *Living Learning Libraries: Standards and Guidelines for NSW public libraries, 2<sup>nd</sup> Edition* and the *Wisconsin Public Library Standards, 4<sup>th</sup> Edition*.

# **Part 1**

# **STANDARDS IN LEGISLATION**

# Standards in Legislation

Public libraries are essential to both our present and our future. They further lifelong learning and encourage creativity. They support strong, healthy communities and help Albertans compete in the global economy. The *Libraries Act* recognizes the unique role of public libraries as a key point of access to information for all Albertans.

- Four principles of service** The *Libraries Act* embodies four principles for equitable public library service:
- **Access:** Albertans have an equal right to access information regardless of economic, social or geographic circumstances.
  - **Accountability:** Provincial and municipal governments are responsible for maintaining a healthy public library service. Library boards are accountable to the citizens and funding authorities.
  - **Service efficiency and effectiveness:** Cooperation among and through library systems is the most efficient means of providing access to information.
  - **Funding:** Public library service is funded by local and provincial tax dollars. Library boards may raise funds. They may not charge for basic public library service.

- Libraries Act* – overview** The *Libraries Act* sets out the elements of free basic public library service:
- access to library facilities
  - use of library resources in the library
  - borrowing library resources
  - acquiring library resources through interlibrary loan
  - consultation by library staff
  - basic information service

The *Libraries Act* and *Libraries Regulation* set the infrastructure required for service at the municipal, intermunicipal, federation and system levels. It allows the municipalities and library boards to cooperate, collaborate and enter agreements for service.

The *Act* also establishes key provincially regulated standards for municipal libraries. The following chart notes the standards which can be found in the *Libraries Act* and the *Libraries Regulation*. Please refer to the *Libraries Act* and/or *Libraries Regulation* at the Queen’s Printer for complete copies of the legislation.

**Table 1: Standards in Legislation**

<b>STANDARD*</b>	<b>REGULATED</b>	<b>SELECTED SECTIONS</b>
Standard #1	<b>Written Bylaws</b>	Act sec. 3, 12.2, 36, 41
Standard #2	<b>Plan of Service</b>	Reg. sec. 13
Standard #3	<b>Written Policies</b>	Reg. sec 7
Standard #4	<b>Reports to Minister and Council</b>	Act sec. 3, 9, 12.2, 12.7, 37 Reg. sec. 3, 4, 11, 13, 15
Standard #5	<b>Written Budget and Estimate of Funds</b>	Act sec. 8, 12.6
Standard #6	<b>Financial Reporting</b>	Act sec. 9, 12.7
Standard #7	<b>Professional Librarian</b>	Reg. sec. 14
Standard #8	<b>Agreements</b>	Act sec. 12.2, 35 Reg. sec. 17
Standard #9	<b>Governance</b>	Act sec. 4, 5, 6, 7, 12.5, 32, 33, 34, 36, 38 Reg. sec. 5, 6
Standard #10	<b>Hours of Opening (school-housed)</b>	Reg. sec.17

\*This chart refers specifically to municipal library boards.

### Written Bylaws

“the council of a municipality may, by bylaw, establish a municipal library board” and “a board may pass bylaws for the safety and use of the library.”

Bylaws are necessary to:

- clarify the rules by which a board of trustees operates
- maintain behaviours, as bylaws are enforceable
- assure continuity and prevent disagreements and misunderstandings. As membership on a board changes over time, specifics and agreements may be forgotten.

Bylaws need to be updated on a regular basis – a good rule of thumb is once every five years. See Alberta Municipal Affairs, Public Library Services Branch’s *Library Bylaws: Questions to Ask*.

### Plan of Service

“a municipal or intermunicipal library board shall...develop...a plan of service with a mission statement and goals and objectives based on a needs assessment...”

A plan of service is important for every library to:

- provide information about the community and library to use in decision-making
- clarify for board, staff and community the role of the library in the community
- evaluate the usefulness and quality of specific services and activities

- assist in preparing for change (dropping old services or adding new ones)
- establish priorities for the allocation of resources.
- document the need for funding

## Written Policies

“every board shall establish policies with respect to the following....”

Written policies are necessary to:

- enable the board, library director, and staff to provide quality service to the community
- provide staff with a framework for the smooth day-to-day operation of the library
- let customers know they are being treated equally and fairly
- avoid staff turnover, crises, bad public relations and law suits through clear, well formulated policies based on good professional, legal and management principles

## Reports to Minister and council

Each board...“shall annually complete and file with the Minister a report....”

Reporting to the Minister and municipal council provides:

- an opportunity to report on progress in meeting the library's goals and objectives as identified in the board's plan of service
- board and staff an opportunity to review the past year's activities
- an opportunity to inform the community of the library's activities
- opportunity for publicity and promotion of the library with public officials and other funding sources
- accountability to province, municipality and other funding sources

## Written budget

Each...“board shall before December 1 in each year, prepare a budget and an estimate of the money....”

A written budget is necessary to:

- obtain the funds needed to provide service. It is a basic requirement to ensure fiscal accountability.
- help show local funding authorities the importance of the library in the community. A well documented and well prepared presentation can be useful for library advocacy.
- provide an understanding of the board's plan of service in numeric form

## Financial reporting

Every board “shall keep accounts of its receipts, payments, credits and liabilities...and have a person...whose qualifications are acceptable by council...prepare a financial report....”

Financial reporting is necessary to:

- fulfill the requirements of both the province and municipality for fiscal accountability of public funds. The public library board of trustees has ultimate responsibility for obtaining funds and spending them wisely to carry out the library's program of services.
- support library advocacy by demonstrating to the province, the municipality and other agencies the care and diligence taken by the library board

## Professional Librarian

A board “with a population of 10,000 or more...employs a graduate of a postgraduate library program...”

Hire a professional librarian to:

- build a library service for the community as well as for the system and network. Librarians are information researchers, literacy experts, technology experts, teachers, community liaisons, programming coordinators, reading advisors, storytellers, material reviewers and creators of multifaceted collections. These are skills specific to the profession and require qualification at a master`s level. Professionally trained librarians are library service experts and are able to adapt and innovate in response to a changing social, technological and economic environment.
- staff a library with competent, well-trained personnel so that it can guarantee effective and quality library service to the community

Note that libraries serving a population of under 10,000 have the opportunity to access a professional level of expertise as a library system participant.

## Agreements

A board...“may enter into agreements with any other municipal board or intermunicipal library board relating to the provision of library services....”

Utilize agreements with municipalities, schools, libraries/consortia or other organizations to:

- make better and more efficient use of resources

- fulfill essential or exemplary service roles with resources unavailable internally

A sample draft, “Joint Operational Agreement between a Public Library Board and School District,” is available in Appendix 1.

## **Governance**

Governance standards provide an infrastructure and an environment of stability.

Governance is necessary to:

- provide the means for the board of trustees to exercise its authority, control and direction over the organization
- ensure legal and financial accountability, strategic direction and continued relevancy and value to the community
- gives clarity of role and responsibility to the board
- provide structure and continuity through board appointment, terms of office and meeting frequency
- communicate, share, collaborate and contract for the delivery of public library service

## **Hours of opening (school-housed)**

A public library housed in a school...”the library is open to the public...during evenings or weekends or both, and during the summer.”

Hours of opening are necessary to:

- provide accessibility to the community

## **Part 2**

# **BEST PRACTICES**



# Governance

The *Libraries Act* sets out the governance structure for public library service. It provides for the establishment of municipal and community library boards at the local level and system boards at the regional level. These autonomous boards cooperate through provincial networks and resource sharing agreements to give access to public library resources to all Albertans.

- Preamble to the *Libraries Act, Chapter L-11 2000: A Guide to the Legislation*

The development and sustainability of quality library service depend upon sound and resourceful leadership. In the province of Alberta four levels of governance perform a leadership role:

- provincial government
- local municipal governments
- municipal library boards
- library system boards

The administrative arms of each level anticipate user needs and employ new service methods effectively. Standards for governance have been established for each level to follow and to incorporate into their roles.

## Provincial role

All library boards must meet the mandate of a public library as defined in the *Libraries Act*.

The provincial role is: to support equitable access to library service; to maintain a governance structure; to provide funding assistance and to establish a province wide network for communications and sharing of library resources. The *Libraries Act* will position Alberta's libraries to take a lead role in the delivery of information in the age of connectivity.

- Preamble to the *Libraries Act, Chapter L-11*

## Municipal governments

Public libraries are a municipal service like others such as fire and recreation. Unlike other services, however, municipalities appoint an autonomous board to oversee library service under the *Libraries Act*. The board must comply with the *Libraries Act* and collaborate with other libraries and boards to provide services.

Regardless of the population base, each local municipal government:

- establishes a library board by bylaw
- appoints library board members in accordance with legislation

- may appoint up to two council members to the municipal library board
- approves the municipal portion of the library board's budget
- joins a library system, pays the system levy and appoints one representative to the library system board

## Municipal library boards

The municipal board, subject to any enactment that limits its authority, has full management and control of the municipal library and shall, in accordance with the regulations, organize, promote and maintain comprehensive and efficient library services in the municipality and may co-operate with other boards and libraries in the provision of those services.

- *The Libraries Act Chapter L-11*

Population is not a determining factor in the performance level determined by the board.

To provide **essential** library service, boards must:

- fulfill their duties as managers, including:
  - establishing and holding the library accountable to its vision, mission and mandate
  - creating and regularly reviewing policy supporting the organizational framework, self-governance, operations and advocacy
  - overseeing regular strategic planning and development of a plan of service
  - hiring, evaluating and supporting a qualified library manager
  - ensuring protection of the library and its assets with appropriate insurance, risk management policies, employment standards, etc.
- support the local community, including:
  - creating and nurturing relationships with elected municipal officials and other community leaders
  - communicating library goals, activities, and direction to their municipal councils
  - informing the community of the board's mandate and outcomes
  - actively advocating for the library within the local, regional and provincial community
- fulfill their duties as governors, including:
  - understanding their role as a governing board
  - having awareness of their legal and ethical responsibilities in their roles as individual board members

- complying with all applicable legislation
- meeting a minimum of three times per year as required by the *Libraries Act*
- being autonomous under the *Libraries Act*: each library board and library system develops service, funding and relationships that respond to local conditions
- function as part of the larger library community, including:
  - participating in system services and consortia and/or functioning as a node
  - cooperating with other municipal libraries and acting as part of an integrated network of libraries
  - holding membership in the Alberta Library Trustees Association (ALTA)
  - participating in issues that affect the library community on a regional, provincial or national level, including lobbying efforts and keeping abreast of applicable legislation

To provide **exemplary** library service, boards must fulfill their essential responsibilities as well as:

- meet as frequently as required
- collaborate with other libraries and/or consortia and act as part of an integrated network of libraries (e.g., the Alberta Public Library Electronic Network (APLEN) or a library system)
- actively seek out relationships with elected officials and other community leaders
- work in partnership with the community to secure support for special projects or enhanced services
- actively pursue continuing education and development opportunities for board members with funding allocated by the board

## Library system boards

The library system board, subject to any enactment that limits its authority and the agreement described in section 13, has full management and control of the library system and shall, in accordance with the regulations and in co-operation with other boards, organize, promote and maintain comprehensive and efficient library services....

- *The Libraries Act Chapter L-11*

Regardless of the population served, each system board must:

- comply with legislation and be autonomous under *The Libraries Act*. Within the legislative framework, each library board and library system, has developed service, funding and relationships that respond to local conditions.
- understand the role of a governing board

- assume a leadership role by supporting and enhancing municipal library services
- fulfill its role as a mechanism for resource sharing among members
- participate in The Alberta Library (TAL), APLEN and other consortia to enhance and expand services
- act in a cooperative and consultative capacity with member libraries

# Collaboration: Partnerships and Relationships

Collaboration is defined as two or more organizations working together in a mutually beneficial relationship.

Benefits of collaboration are:

- to expand sources of funding and support
- to add value to the community service that is the library
- to achieve goals that cannot be accomplished alone
- to limit duplication
- to share resources

Public libraries have many partners within the province that support and enhance their operations. The following are partnerships and/or relationships that a library may, directly or indirectly, undertake.

## **Community partnerships**

To respond with maximum effectiveness to the entire community, libraries reach out to agencies and organizations. These relationships help library staff and boards gather information about local needs, while enhancing and expanding library services. Community partnerships can help the library find cost effective and efficient solutions to problems and avoid duplication of services. The overarching goal is to have positive, collaborative relationships with all community partners.

## **Municipal councils**

The most significant community relationship for any library board is the one with its municipal council, as the library board provides a municipal service for the council. Councils and associated municipal staff need to be informed of library successes and challenges regularly. Excellent two-way communication and an understanding of the roles of both parties underscore a strong partnership. There are many areas in which the municipal council could support the local library by sharing expertise (e.g., human resources, maintenance, or financial accounting).

If a library board contracts with the municipal council for certain services, it is strongly recommended that a service agreement be developed by the board which outlines and values the services. Generally, municipalities also provide the facility for the local library. The library board must present an annual budget to council and request funds for the following year.

## **Media**

Engaging the support of community media supports the advocacy role of the library board. Community event calendars, regular library columns, press releases and news stories covering library

events and programs are critical for advancing the profile of the public library.

**Community organizations and agencies**

These organizations and agencies express and serve the needs of and interests of the community. They vary by community and a library's plan of service, but some general categories include:

- culture and recreation (e.g., museums, arts organizations, sports clubs, historical societies)
- education (e.g., schools, colleges, universities, adult learning, homeschooling)
- business (e.g., Chamber of Commerce, small businesses, employment services)
- social services (e.g., literacy organizations, immigrant associations, food banks, youth centres)
- health and wellness (e.g., mental/physical health practitioners, support groups)
- spiritual (e.g., churches, mosques, synagogues, native healing centres)
- service clubs and community organizations (e.g., Lions, Rotary, Kinsmen, agricultural societies)
- government (e.g., municipal councils, provincial government, federal agencies)

**Southern Alberta Information Network (SAIN)**

The Southern Alberta Information Network is an informal coalition of publicly funded library organizations which are engaged in public information services.

**Rural Information Services Initiative (RISE)**

The RISE project is an initiative created by three library regions in southern Alberta (Chinook Arch Regional System, Marigold Library System and Shortgrass System). The project aims to increase rural quality of life in southern Alberta by enhancing communication with healthcare professionals, educators, families, libraries, entertainers, and others via video conferencing.

**Regional library systems**

**Provincial Partnerships**

Library systems are a cooperative of municipalities that have agreed to work together to provide an additional level of service to the public. By working together as members, they are able to accomplish more than any single library could alone. Individual library boards remain autonomous.

There are seven library systems in Alberta. Systems are established by the Minister of Municipal Affairs at the request of the municipalities based on geographical boundaries. They include:

- Chinook Arch Regional Library System (southwest)
- Marigold Library System (south central)
- Northern Lights Library System (northeast)
- Parkland Regional Library System (central)
- Peace Library System (northwest)

- Shortgrass Library System (southeast)
- Yellowhead Regional Library System (north central)

**Provincial Resource Sharing Network**

The seven library systems, plus Calgary, Edmonton, Grande Prairie, Lethbridge, Medicine Hat, Red Deer, St. Albert, Regional Municipality of Wood Buffalo, and Strathcona County Public Library Boards, in partnership with the Public Library Services Branch of Alberta Municipal Affairs, are parties to a formal resource sharing agreement

Alberta Municipal Affairs also contracts with the Chinook Arch Regional Library System to administer the interlibrary loan network.

**The Alberta Library (TAL)**

TAL is a consortium of public, academic and special libraries that work together to achieve collective goals. TAL’s vision is “barrier-free access for Albertans to information, ideas and culture.” TAL works with vendors to negotiate provincial licensing costs for electronic databases. It operates the *TAL Card* and *TAL Online*.

**Alberta Public Library Electronic Network (APLEN)**

APLEN supports public libraries by providing opportunities for collaboration, cooperation and innovation at the provincial level. APLEN coordinates the development of an electronic network, with respect to both content and capacity. It coordinates the *Ask A Question* service with participating post-secondary libraries. APLEN also assists libraries with staff development and training.

**The Regional Automation Consortium (TRAC)**

TRAC is a partnership of Marigold Library System, Northern Lights Library System, Peace Library System, Yellowhead Regional Library System, and their member libraries. TRAC provides a combined catalogue of the holdings of the four systems.

**Southern Alberta Integrated Library System (SAILS)**

SAILS is a partnership between Chinook Arch Regional Library System and Shortgrass Library System and their member libraries. SAILS partners share common hardware to supply core library business applications.

**Metro Area Group Network (MAGNET)**

Strathcona County Library and Fort Saskatchewan Public Library share a common patron and bibliographic database. St. Albert Public Library is also a partner in MAGNET, sharing common hardware to deploy their core library business applications.

**Professional Organizations**

Professional organizations provide a network of professional development, information sharing and mentoring that support individual library staff and board members. They are a bridge to information, knowledge, advocacy and best practices.

Organizations include:

<b>Library Association of Alberta (LAA)</b>	The Library Association of Alberta promotes intellectual freedom, and provides continuing education. It collaborates with those interested in achieving excellence in library and information services.
<b>Alberta Library Trustees Association (ALTA)</b>	The Alberta Library Trustees Association represents the interests of Alberta library trustees and the interests of patrons and supporters of public libraries. The Alberta Library Trustees Association promotes effective library service and leadership in communication and advocacy and encourages trustee education and development.
<b>Alberta Association of Library Technicians (AALT)</b>	The Alberta Association of Library Technicians is dedicated to fostering and enhancing the professional image of library technicians. AALT was formed in 1974 to help promote a wider understanding and acceptance of the status of library technicians in Alberta and to assist in the implementation of recognized provincial education standards.
<b>Greater Edmonton Library Association (GELA)</b>	The Greater Edmonton Library Association facilitates the interaction and continuing education of librarians, library technicians, library staff, students and other interested parties in Edmonton and surrounding areas.
<b>Foothills Library Association (FLA)</b>	The objectives of the Foothills Library Association are to bring individuals together within the Calgary library community to share and promote the concerns of the library and information professions.
<b>Pacific Northwest Library Association (PNLA)</b>	The Pacific Northwest Library Association is an organization of people who work in, with, and for libraries. PNLA provides opportunities in communication, education and leadership that transcend political boundaries. PNLA supports continuing education needs and developing stronger library networks.
<b>Canadian Library Association (CLA)</b>	The Canadian Library Association serves as the national voice of the Canadian library and information community. It delivers a range of value-added services to professional librarians, library technicians, trustees and the organizations that employ them.
<b>American Library Association (ALA)</b>	The American Library Association provides leadership for the development, promotion, and improvement of library and information services and the profession of librarianship. It enhances learning and ensures access to information for all in the USA. The Public Library Association (a chapter of ALA) focuses specifically on public library issues.



**International Federation  
of Library Associations  
and Institutions (IFLA)**

The International Federation of Library Associations and Institutions is the leading international body representing the interests of library and information services and their patrons. It is the global voice of the library and information profession.

# Plan of Service

In managing and controlling a library, a library board shall...develop and file with the Minister a plan of service with a mission statement and goals and objectives based on a needs assessment of the municipality or municipalities served by the board, and annually review its plan of service.

--*Libraries Regulation*

## Required regularly

Library boards are required to file a plan of service with Alberta Municipal Affairs at least once every five years. Library system boards, however, must develop a plan of service every three years. (A library system board uses the plan to serve the needs of its participating members and library boards.)

## Benefits of a plan

The plans become a tool for the Ministry to see the needs, issues and new developments faced by boards. The Ministry can use these plans to develop its own plan related to building a network of “quality library service.”

A plan of service, however, is more than a legal requirement; it is a vital tool for effective governance and management of library service:

- It aligns the library with the community and improves services by identifying those needs that the library can fulfill.
- It provides the library board with a communication tool to highlight the value of the library within the community.
- It functions as a strategic plan for the board; it is a guide in developing, implementing and evaluating the plan of action.
- The board’s goals and objectives are identified and measureable. The board is accountable for the identified outcomes.
- It becomes a tool for the board in the budgetary process.

## Recommended method

*Strategic Planning for Results* written by Sandra Nelson and published by the Public Library Association provides the recommended method to develop plans of service for Alberta libraries because:

- It focuses on community needs and library services.
- It explains how to do planning step by step.
- It is the best known and most recognized planning process for public libraries.
- Many Albertan library professionals are familiar with the process, and assistance is available.

The method of *Strategic Planning for Results* is as follows:

- A group of people from the community meet to consider community needs and pick “public library service responses” to meet those needs.
- The library board writes goals and objectives that put the service responses into action.
- The goals and objectives form the basis for the written plan of service.

## Service responses

Service responses are an integral part of planning and evaluating library service in Alberta. They help libraries identify and define goals and objectives while creating a plan of service. As well, service responses help libraries determine if their programs are meeting the community needs. They also identify potential partnerships in a community or within the province.

The service responses below were developed in 1997 as part of *Strategic Planning for Results: A Public Library Transformation Process*. Service responses define “what a library does for, or offers to, the public in an effort to meet a set of well-defined community needs.” These 18 service responses provide a context for a broad-based discussion of library priorities with community leaders and elected officials, community residents (both library patrons and non-patrons), library staff, and library board members. As part of these discussions, service responses help connect the programs and services the library offers to broader community needs.

Libraries are **not** expected to provide service in all 18 service response areas. Rather, a library is expected to select a few service responses that best meet the needs of the community and give priority to resources and programming for the areas selected.

**List of service responses** This is a list of service responses to consider:

1. **Be an informed citizen:** Local, national and world affairs. Residents will have the information they need to support and promote democracy, to fulfill their civic responsibilities at the local, provincial, and national levels, and to fully participate in community decision-making.
2. **Build successful enterprises:** Business and non-profit support. Business owners and non-profit organization directors and their managers will have the resources they need to develop and maintain strong, viable organizations.
3. **Celebrate diversity:** Cultural awareness. Residents will have programs and services that promote appreciation and understanding of their personal heritage and the heritage of others in the community.
4. **Connect to the online world:** Public Internet access. Residents will have high-speed access to the digital world with no unnecessary restrictions or fees to ensure that everyone

can take advantage of the ever-growing resources and services available through the Internet.

5. **Create young readers:** Early literacy. Children from birth to age five will have programs and services designed to ensure that they will enter school ready to learn to read, write and listen.
6. **Discover your roots:** Genealogy and local history. Residents and visitors will have the resources they need to connect the past with the present through their family histories and to understand the history and traditions of the community.
7. **Express creativity:** Create and share content. Residents will have the services and support they need to express themselves by creating original print, video, audio or visual content in a real-world or online environment.
8. **Get facts fast:** Ready reference. Residents will have someone to answer their questions on a wide array of topics of personal interest.
9. **Know your community:** Community resources and services. Residents will have a central source for information about the wide variety of programs, services and activities provided by community agencies and organizations.
10. **Learn to read and write:** Adult, teen and family literacy. Adults and teens will have the support they need to improve their literacy skills in order to meet their personal goals and fulfill their responsibilities as parents, citizens and workers.
11. **Make career choices:** Job and career development. Adults and teens will have the skills and resources they need to identify career opportunities that suit their individual strengths and interests.
12. **Make informed decisions:** Health, wealth and other life choices. Residents will have the resources they need to identify and analyze risks, benefits and alternatives before making decisions that affect their lives.
13. **Satisfy curiosity:** Lifelong learning. Residents will have the resources they need to explore topics of personal interest and continue to learn throughout their lives.
14. **Stimulate imagination:** Reading, viewing and listening for pleasure. Residents will have materials and programs that excite their imaginations and provide pleasurable reading, viewing, and listening experiences.
15. **Succeed in school:** Homework help. Students will have the resources they need to succeed in school.
16. **Understand how to find, evaluate, and use information:** Information fluency. Residents will know when they need information to resolve an issue or answer a question and will have the skills to search for, locate, evaluate, and effectively use information to meet their needs.
17. **Visit a comfortable place:** Physical and virtual spaces. Residents will have safe and welcoming physical places to meet and interact with others or to sit quietly and read and will

have open and accessible virtual spaces that support networking.

18. **Welcome to Canada:** New immigrants will have information on citizenship. English as a second language (ESL), employment, public schooling, health and safety, available social services and any other topics that they need to participate successfully in Canadian life.

### Tips for the responses

The service responses are not intended to be a comprehensive list of every service or program offered in public libraries. Nor should they be used haphazardly to generate program and service ideas that are not tied to a library's plan of service. Rather, service responses are intended to:

- Describe the primary service roles or priorities of public libraries.
- Describe the benefits the community will receive as a result of the library service.
- Provide a common vocabulary that can be used by library staff, trustees, and community leaders to identify service priorities for specific libraries.
- Identify possible policy implications that library managers and boards will need to address if the service response is selected as a priority.
- Define the resources (staff, collections, facilities, technology) required to support specific service priorities.
- Provide measures that can be used to evaluate services in priority areas.

### Set goals & objectives

**Goal:** A goal is defined as the benefit a community (or a target population within a community) receives because the library provides a specific service response. Each goal is derived from a specific service response. All goals contain the same two elements: they begin with the audience being served, and then describe the benefit the audience receives because the library offers a service.

For example, the following goal could support the "Create Young Readers" service response: *All children in Anytown will enter school ready to learn to read, write, and listen.*

**Objective:** An objective is the way the library will measure its progress toward reaching a goal. Every objective contains the same three elements: a measure, a standard of progress against which to compare that measure, and a date or timeframe by which time the standard should be met.

For example, an objective for the above "Create Young Readers" goal is: *Each year at least 85 percent of parents and caregivers of preschool children will say that the library plays an important role in helping children to develop a love of books, reading and learning.*

**Resources available**

There are several resources available to assist libraries in the planning process, including implementing service responses. In addition to *Strategic Planning for Results* by Sandra Nelson, a toolkit is available on the Alberta Municipal Affairs Public Library Services Branch website [www.albertalibraries.ca](http://www.albertalibraries.ca).

The consultants at the Public Library Services Branch, library systems and other staff in the province have received training in how to implement planning.

# Personnel

Library boards, like all employers, must abide by the *Employment Standards Code*, *Labor Relations Code*, human rights legislation, and relevant federal and provincial legislation.

## Personnel policies

The library has board-approved personnel policies that are consistent with provincial and federal regulations, are reviewed at least every three years, and are made available to all staff members.

Personnel policies are required under the *Libraries Regulation* for:

- job descriptions for employees and volunteers
- performance appraisals for employees and volunteers
- qualifications for staff positions
- working hours
- conditions of employment
- grievance procedure
- orientation of staff
- continuing education for staff, including expenses for attendance at library meetings, conference workshops and courses, and memberships in library associations

The responsibilities of the designated employee roles are outlined below.

## Library manager

Regardless of the size of the community, a library board has one employee who is responsible for the administration of library services: the library manager, supported by staff and volunteers.

The library manager is responsible for recruiting, hiring, training, supervising and releasing all staff and service volunteers.

Supported by the staff, the library manager:

- manages the budget
- recommends and implements policies
- engages in strategic planning (e.g., plan of service, technology plan, business plan)
- oversees the implementation of the library's plan of service
- manages the library:
  - delivers service responses as identified in the plan of service
  - carries out effective collection development practices (including selection and weeding)
  - provides guidance in the use of library resources
  - ensures that reference and reader's advisory services are available
  - maintains awareness of and implements current and emerging technologies

- ensures library equipment is functional
- utilizes appropriate problem-solving and decision-making skills to further the goals and objectives of the library
- adapts to new ideas and changing methods in order to offer improved library service
- ensures maintenance and safety of the facility and staff
- markets and promotes library services to the entire community
- works effectively with board members, staff and colleagues
- works with political and social structures of the community
- makes effective use of system consultants, Libraries Branch consultants and other library development resources
- keeps up to date on relevant provincial and federal legislation
- creates relationships with community organizations

### **Staff skills**

Staff members assist in the smooth running of the library. They must possess the range of skills necessary to assist patrons in a knowledgeable manner, including:

- interpersonal skills
- social awareness and sensitivity
- teamwork and leadership
- competence in library practices and library procedures
- technology competencies
- problem solving

### **Staff qualifications**

Qualifications for staff include the following:

- Librarians have a MLS or MLIS degree from a university or equivalency accredited by the American Library Association.
- Library technicians have a recognized diploma from a technical or educational institute.
- A Library Operations Assistant (LOA) can obtain a certificate from an LOA distance education program (or equivalent). The LOA must also have a high school diploma.
- Library managers must be able to implement necessary technology, as outlined in the document *APLEN Core Competencies for Technology*.
- Library staff must have a high school diploma, with the exception of pages or student positions.

A table at the end of this section shows recommended staffing levels and experience according to population served.

### **Volunteers**

Volunteers enhance public library service in meaningful ways that reflect the abilities, needs and backgrounds of the volunteer and the library. Volunteers are not a substitute for paid staff. Operational activities should not depend on volunteer labour.



Volunteers' educational requirements vary based on the needs of the library and the position.

**Educational programs**

Educational programs ensure library personnel have attained a level of expertise that enables them to handle information effectively. All library staff should receive ongoing training and professional development opportunities to keep skills current.

**Job descriptions and salary scale**

Job descriptions for all positions and a salary grid are made available to all staff members. Job descriptions list the main responsibilities of each position and include any educational and/or experience requirements.

**Fair and equitable compensation**

Library employees have salaries, hours, and benefits comparable to other community positions that require a similar education and level of responsibility (e.g., local municipality and school district positions).

Salary schedules should provide for regular increases and/or for additional merit increases and/or for recognition of continuing education.

**Orientation**

The library board has an orientation policy in place for all new employees to introduce them to the mission, goals, objectives and policies of the library, as well as to the particular responsibilities of the job. New employees are provided orientation to their local board's policies and services and to their library system as appropriate.

Volunteers receive an orientation to the library including an orientation to the rights and responsibilities of volunteers. Each volunteer receives training customized to the assignment and the individual.

**Continuing education, training, & professional development**

The library board encourages continuing education and training for its staff and makes provision for this in its policy, plan of service and budget. Membership in a library organization is strongly encouraged. Staff members are given the opportunity to learn to use new equipment and technology, including new databases and software. Other skills that could be developed include current trends, service to specific groups, programming, coaching and training the public.

The library board provides funding to train all staff adequately, including leadership and management skills. This funding should cover wages, registration and related travel expenses for attendance at conferences, workshops and in-service training. The library should send its library manager to at least one major provincial library conference (e.g., NetSpeed, the Alberta Library Technicians Conference or the Alberta Library Conference) or to a library system conference each year.

**Working conditions**

Library boards must comply with the *Employment Standards Code*, the *Occupational Health and Safety Act*, human rights legislation and other relevant legislation. All library staff are trained and equipped to deal appropriately with emergency situations in the library.

Ergonomically designed furniture and equipment should be available for the comfort and health of library staff. Library staff have access to e-mail for work-related communication and professional development (also refer to the sections Technology and Facilities).

**Staff evaluation**

Staff performance is evaluated annually. A performance appraisal system is in place that provides staff with an evaluation of current performance as well as ongoing guidance in improving or developing new skills. Under the appraisal system, the library board evaluates the library manager, and the library manager is responsible to evaluate all other library staff.

**Co-location consideration**

Public libraries sharing a space with school libraries or other institutions must consider their own interests when formulating personnel policies:

- They must have a joint operational agreement between the library board and the partnering authority outlining the responsibilities of the board and the other authority for the operation of the library, including the responsibilities of the employees and volunteers of both.
- The board must keep its own bank account and signing officers, none of whom are employees of the other party/school authority.
- If housed in a school, the library must also be open to the public outside of school hours, including evenings or weekends or both, and during the summer. See *Appendix #1-Joint Operational Agreement*.

**Table 2: Staffing Levels, Education, Experience**

Population	Essential	Exemplary
Up to 1200	Open hours +20%**** High school diploma* Knowledge of library operations Computer competency** Attend minimum of one library conference or library or business related course per year.	- Open hours + 25%**** - LOA Certificate* - 3 years library experience
1,201 – 3,000	Open hours + 20%**** High school diploma* Knowledge of library operations Computer competency** Take courses towards LOA certificate over three years.	- Open hours + 25%**** - LOA Certificate* - 3 years library experience
3,001 – 5,000	0.5 FTE/1000 population LOA Certificate* Computer competency**	- 0.7+ FTE/1000 population - Library Technician* - 3 years library experience
5,001 - 10,000	0.5 FTE/1000 population Library Technician* 3 years library experience*	- 0.7+ FTE/1000 population - 1 MLS or MLIS* - 5 years library experience - IT staff on site***
10,001 - 20,000	0.5 FTE/1000 population 1 MLS or MLIS (legislated)* IT staff on site*** 3 years library experience	- 0.7+ FTE/1000 population - 2 MLS or MLIS* - 5 years library experience
20,001 – 50,000	0.5 FTE/1000 population 1/10,000 MLS or MLIS IT staff on site 3 years library experience	- 0.7+ FTE/1000 population - 1+/10,000 MLS or MLIS - 5 years library experience*
50,001 - 100,000	0.5 FTE/1000 population 1/10,000 MLS or MLIS IT staff on site 3 years library experience	- 0.7+ FTE/1000 population - 1+ MLS or MLIS/10,000 - IT staff on site - 5 years library experience
100,000+	See CULC statistics	- See CULC statistics

Calgary and Edmonton Public Libraries currently use the *Canadian Urban Libraries Council Statistics* (CULC) as one guideline in their personnel infrastructure.

\*Experience refers to library manager or one staff equivalent.

\*\*Refer to *APLEN Technology Core Competency* document.

\*\*\*Libraries without on-site IT staff have access to IT expertise from a regional library system and/or from local companies.

\*\*\*\*Percentage of additional time required by staff to prepare for public or for administrative functions.

# Collection Management

## Community need

The public library, as the centre of information in the community, makes all kinds of knowledge and information available to patrons:

- All age groups must have access to sufficient, high quality material relevant to their needs, both current and potential, with respect to literacy, culture, education, recreation and information.
- Collections and services have to include all types of appropriate media and modern technologies as well as traditional materials.
- Collections should not be subject to any form of ideological, political or religious censorship, nor commercial pressure (paraphrased from the *UNESCO Public Library Manifesto*).

## Intellectual freedom

Libraries endorse the *Canadian Library Association Statement on Intellectual Freedom*, which states that “it is the responsibility of libraries to guarantee and facilitate access to all expressions of knowledge and intellectual activity, including those which some elements of society may consider to be unconventional, unpopular, or unacceptable.”

## Collection development

Libraries strive to provide access to a balanced and relevant collection for Albertans. To achieve this, the library has a collection development policy that covers selecting and withdrawing materials, accepting donations, and addressing challenges to materials. Collection development policies should be reviewed at least every three years. Additionally, community assessments must be carried out regularly to ensure the collection meets the needs of the community.

Collection development should be influenced by the following:

- plan of service
- population demographics
- age/size of collection
- collection specialties and purchase priorities
- demand as measured by circulation per capita
- presence/access to other collections

The following list illustrates the wide variety of formats that should be included in the library’s collection. This list is by no means static; it is imperative that libraries keep informed of new formats and new methods of accessing information:

- print materials, including large print
- world language materials\*

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\* While libraries may not actively collect these items, they can provide access through resource sharing, partnerships and/or by contract.

- audio-visual materials
- electronic resources, including downloadable content<sup>\*</sup>
- graphic materials
- magazines, periodicals, newspapers
- alternate format materials (e.g., for persons with disabilities)<sup>\*</sup>

Materials are arranged for easy accessibility and must be catalogued using the most recent Anglo-American Cataloguing Rules (AACR2), Dewey Decimal Classification (DDC) or Resource Description and Access (RDA).

### **Size of collections**

Collection size is dependent on the size of population served. However, no matter what size of community it serves, a library should have a base collection of at least 2,500 books.

As a general guide an established book collection should be between 1.5 to 2.5 books per capita. All library materials are kept current with the majority being less than five years old.

The periodical collection should be 0.005 to 0.01 per capita for libraries up to 10,000 and 0.003 to 0.005 per capita for 10,000 or more. Smaller libraries may have a higher per capita collection size in order to respond to patron demands. The number of print subscriptions may also be impacted by the number of electronic subscriptions available.

The non-print collection includes all audio-visual and audio-media collections, such as audiobooks, Playaways, DVDs, etc. It does not include any downloadable material. The general rule of thumb is 0.25 to 0.50 per capita.

### **Selection of materials**

Selection of library materials should be performed regularly throughout the year by suitably qualified and experienced staff using a range of selection tools. A library's annual expenditures should be allocated appropriately to ensure a steady flow of new items for the public.

Collections reflect the library's plan of service, local policy and demographics. Typically, the collection is balanced to provide materials for juveniles (both children and young adults) and adults. Additionally, the library should choose materials that provide access to Canadian content, culture, heritage and values.

### **Reference materials**

Reference materials should be made available in every public library, and selection is influenced by the availability of electronic resources. All library patrons should have access to the services

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<sup>\*</sup> While libraries may not actively collect these items, they can provide access through resource sharing, partnerships and/or by contract.

of trained and knowledgeable staff members to assist with their information needs. These services and/or materials may be provided locally or remotely through print publications, electronic resources, commercial reference databases, and/or the internet.

### **Electronic resources**

Electronic resources are an essential part of the collection that the public expects to access, either at the library or from home. Access to these may be through digital licensing or actual development of local databases, often concerning local history or genealogy. Staff can collaborate with other libraries, consortia and the province when determining the best practice for purchase or digitization of authoritative resources.

### **Weeding the collection**

A large collection is not synonymous with a good collection. Collections should be evaluated regularly by experienced staff to ensure their currency, accuracy, quality and appeal.

Weeding is an essential part of library service. It ensures that items are current and reliable while creating a more open and attractive space that is easy to browse. This leads to both an increase in circulation and a more effective workforce as both library users and staff can find materials easily. Equally important, space is made available for new materials:

- It is best to establish a yearly weeding schedule that divides the collection into sections, thereby making the process more manageable.
- Materials that are damaged, unnecessary or outdated should be discarded.
- Age, frequency of use and physical condition must be taken into consideration when removing or replacing materials.
- Informal weeding may also occur as an ongoing process as materials are circulated.

Between seven and eight percent of the collection should be weeded every year so that the entire collection would be replaced approximately every 15 years. Library systems will assist member libraries with weeding procedures.

# Information Service

Information service is a process by which trained library staff members satisfy the information needs of their patrons by accurately identifying what is required and providing it or referring the patron to the most appropriate source. Information service is personal and confidential.

## Essential service

Staff members provide the essential aspects of information service when they:

- clarify requests for information by using appropriate questioning/interviewing techniques
- provide information services to patrons in person and by telephone during open hours
- provide information services to patrons with disabilities in formats they can use, with the assistance of the library system or a consortium if necessary
- answer basic directional/informational questions within one hour
- know how to access the Ask A Question (AAQ) service
- forward informational questions to the resource library or AAQ if unable to answer within 24 hours
- provide instruction to patrons in the use of the online catalogue
- assist patrons with use of electronic and other non-print resources
- publicize information services in the library and the community

## Exemplary service

Staff members provide exemplary information service when they also:

- answer complex requests for information
- provide responses to Ask A Question in cooperation with the resource library
- cooperate with other agencies in the community to provide information services
- provide patrons with advanced level instruction in the use of online databases
- provide patrons with advanced training in the effective use of technologies to access electronic or other non-print resources
- prepare information guides to inform patrons about the availability of resources on a specific topic or issue

# Resource Sharing Including Interlibrary Loan

Resource sharing “means making available to other libraries the library resources owned by a board, the information contained in those resources and the staff expertise required to locate and make available the information or the library resources.”

## Provincial policy

Libraries, regardless of their size, are expected to participate in resource sharing by abiding by the terms set out in the *Provincial Resource Sharing Network Policy*.

## Equitable access

This ensures that Albertans have equitable access to resources which meet their information, educational, cultural and recreational needs. This access is even stronger if it crosses jurisdictional lines and different types of libraries.

## Board policy required

The *Libraries Regulation* states that every board must establish policies with respect to “resource sharing, including participation in a provincial resource sharing network and the conditions that apply.” Interlibrary loan is an adjunct to, not a substitute for, adequate local collection development.

## Sharing: essential steps

To provide equitable access to resources, it is essential that libraries:

- **Ensure mutual respect** and trust with lending libraries by following the policies of the lending library.
- Consider interlibrary loan between libraries as a mutual relationship.
- Process interlibrary loan requests within one working day.
- Provide loan periods that are sufficient to allow for travel time, special circumstances, etc.
- Make library resources available as defined in the *Provincial Resource Sharing Network Policy* (e.g., fragile or high demand items are not required to be loaned).
- Exhaust local or library system resources before using the resource sharing network.
- Provide copies when appropriate for loan in compliance with copyright regulations.
  
- **Provide patrons** with the ability to place interlibrary loan requests.
- Provide interlibrary loan services without charge to other libraries within Alberta, and without charge to patrons. Public library requests may encounter charges from academic libraries or libraries outside of Alberta which may be passed on to patrons.



- Treat interlibrary loan requests as confidential.
- **Provide staff expertise**, training, equipment, and resources to promote and support this service.
- Ensure staff members follow resource sharing procedures, guidelines and policies.
- Track interlibrary loan requests for the purposes of collection development
- Track resource sharing statistics.
- Maintain working knowledge of resource sharing tools such as TAL Online and the current interlibrary loan software.

# Technology

## Philosophy

Technology is a tool that helps provide library service. Adoption and development of technological resources should fulfill specific needs and service principles, as opposed to being adopted for progress' sake alone.

## Standards

Technology standards are set or determined by the participating library board, the regional library system, The Alberta Library (TAL) and agreements with the Alberta Public Library Electronic Network (APLEN) and the accepted recommendations of the *Alberta Municipal Affairs Public Library Technology Plan*, which will be released in 2011. Further, all libraries are expected to comply with the *Libraries Act* and the *Freedom of Information and Protection of Privacy Act* (FOIP) in removing past usage and internet histories on public stations, and concealing all patron information from the public.

Participating libraries must connect to a node and the node must have a Z39.50\* (or approved equivalent) compliant Integrated Library System (ILS). (Z39.50 protocol allows multiple library catalogues to be searched simultaneously by one software product. In the case of TAL Online, Site Search is the software used.)

Member libraries are expected to participate in resource sharing according to *Provincial Resource Sharing Network Policy* using provincial resource sharing software.

## Technology plan

Public library boards should have a technology plan tied to budget which includes hardware, software and training. Statements about authorized software, licenses, authorized use, and a yearly review of hardware and software should be included.

## Basic Technology

The public library must have sufficient basic technology and trained staff (see Personnel) to support daily operations:

### *For Public Use:*

- public use computers
- photocopier machine
- printer or multi-service printer
- library website, including: contact information, cardholder information, hours, location, feedback method, access to library resources (e.g., catalogue, remote resources), website search, list of services provided

### *For Staff Use:*

- staff use computers
- fax machine

- phone service with voicemail
- corporate e-mail domain
- library software (e.g., resource sharing, ILS)
- photocopy machine
- printer or multi-service printer

**Performance statistics** A library is required to collect electronic performance measurement statistics for its annual report to Alberta Municipal Affairs, Public Library Services Branch. The report is designed to reflect library use beyond the traditional borrowing of materials and answering of reference questions.

**Expertise** When purchasing equipment, setting up network configurations, or deciding on placement of equipment, public library boards are encouraged to involve their node partner or library system staff. Library systems will help member libraries purchase equipment that meets existing industry standards. Library system staff will also suggest appropriate equipment for reliable, stable Internet connectivity.

**Table 3: Technology – Essential and Exemplary**

**Technology Provision**

<b>Essential (at all populations)</b>	<b>Exemplary (at all populations)</b>
High speed broadband internet connection with sufficient bandwidth to support current and anticipated web-based library service.	Local access to technology training facilities.
Free public internet access during all library open hours.	IT support (OPAC management, file servers, patron account management, hardware IT, etc) onsite, contracted privately or through membership in a regional library.
Web-based ILS access.*	Availability of videoconferencing services.
Website and domain name.*	Wireless internet access.
Access to training lab and/or projectors.*	
Provision of assistive technologies.*	

**Public Access Computer Provision**

<b>Essential</b>	<b>Exemplary</b>
Minimum 2 public access computers, +1 computer per 3,000 population.	Minimum 2 public access computers, +1 computer per 2,000 population.

**Staff Computer Workstation Provision**

<b>Populations</b>	<b>Essential</b>	<b>Exemplary</b>
<b>Up to 3,000</b>	1 staff workstation	1 staff workstation per FTE
<b>3,001 – 5,000</b>	2 staff workstations	1 staff workstation per FTE

\* Library system may provide these services.

Over 5,000	1 staff workstation per FTE	
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**Library Resources Access** Libraries provide efficient and timely access to physical and virtual library resources.

<b>Essential (at all populations)</b>	<b>Exemplary (at all populations)</b>
Web-based library catalogue that supports MARC/RDA records.	Social OPAC and/or website functionality.
Access to subscription databases.	Mobile access to library website.
Remote user access to online library resources 24/7.	Mobile access to library catalogue.
	Alternative access to library website (e.g. social media).
	Remote access to downloadable content.
	Videoconferencing and/or video streaming.
	Federated searching of library resources.

### Support and Connectivity for Libraries\*

<b>Essential (at all populations)</b>	<b>Exemplary (at all populations)</b>
IT support during weekday business hours.	Remote access for staff.
Trouble ticket system.	Intranet web services.
	IT support available evenings/weekends.

### Security

<b>Essential (at all populations)</b>	<b>Exemplary (at all populations)</b>
Offer a secure public access computing environment with appropriate security measures (e.g., firewalls, authentication).	Separate (physically or virtually) staff and public network traffic.
Regularly install critical updates and patches on operating systems and software.	Secure socket layer (SSL) (e.g. email, e-commerce, online registration/renewal).
Computers configured to maximize patron privacy.	Library-specific security best-practices plan that is followed at all times.

### Policies and Planning

<b>Essential (at all levels)</b>	<b>Exemplary (at all levels)</b>
Acceptable use policies.	Destruction and removal policies.
Privacy policies.	Asset inventory management.
Security policies.	Evergreening plan.
Disaster recovery plan.	
Long range technology plan.	
Regular collection of library statistics and proper application of data.	

\* Library system may provide these services.

# Hours of Opening

## Accessibility

Libraries should be open at times the community can make the most effective and convenient use of library services.

## Community need

Hours of opening will be determined and implemented based on a community needs assessment and current/anticipated traffic patterns. Based on actual and potential customer needs, hours should include evenings and weekends in addition to regular weekdays.

Variables which influence hours of opening include:

- number of branches and size (area and population) of the community served
- staff numbers
- local shopping and school hours
- commuter population and schedules

## Essential service

Essential service requires that:

- library opening hours are displayed outside service points.
- opening hours are consistent, predictable and easy for customers to understand.
- changes to opening hours are advertised well in advance.
- the nature of the community is taken into account (e.g., young people, families with children, seniors).
- the library provides after-hours facilities for return of library materials.
- library facilities are readily available to all residents of the service jurisdiction, within a 15 minute drive in metropolitan areas or a 30 minute drive in rural areas.

## Exemplary service

Exemplary service can require that:

- library hours are fixed and include morning, afternoon, evening and weekend hours, based on assessment of users and potential users rather than on staff convenience.
- remote access to library resources (e.g., online library services and resources, including the online catalogue) is available at all times.
- the hours, once set, are routinely reviewed and adjusted as needed to take into account changing demographics and circumstances.

The library establishes and meets the standard for hours open, appropriate for size of population served.

**Table 4: Hours of Opening**

<b>Population Categories</b>	<b>Essential (per week)</b>	<b>Exemplary (per week)</b>
0-600	15	36+
601 -1,200	20	40+
1,201-3,000	25	44+
3,001-5,000	37	54+
5,001-10,000	43	57+
10,001-25,000	47	63+
25,001-60,000	55	64+
60,001-100,000	57	65+
Over 100,000	59	65+

**Public libraries in schools** In 2008 there were 59 public libraries housed in schools in Alberta, almost 20 per cent of the service points in Alberta. The majority are in small communities. Hours of opening include daytime school hours as well as mandated public hours.

A public library housed in a school must be open to the public outside of the hours during which the school is in operation for regular classes, including being open during evenings or weekends or both, and during the summer.

*--Libraries Regulation 17(c)*

# Facilities

## Community needs

A library facility is shaped by the library's mission statement and service goals. The facility is designed with community needs in mind. It arises from a community needs assessment and service responses identified by the board. Ideally, a library facility is flexible, functional, attractive and adaptable.

## Location requirements

The library should be located near a business, municipal or recreational area to provide greatest accessibility to patrons. It should have a separate entrance if the library is housed in a shared facility. The facility must comply with federal, provincial and local building codes and safety regulations. Barrier-free physical access for the disabled is required for new library buildings and is desirable for existing structures.

## Layout considerations

Libraries less than 19,000 feet squared (1,765 meters squared) should ideally be located on a single level. The most efficient space is open and square or rectangular rather than being irregular in shape.

Major service factors to consider in developing a facility plan are: collection size, use of technology, adult and children's programming, seating, and meeting room space. Architectural formulas for space allocation are used to determine actual facility size and design.

As a public space:

- the library is comfortable, safe, efficient and inviting for patrons to take advantage of library services
- the library has adequate access to electrical and cable outlets to support current technology
- the library has adequate programming space to fulfill its stated mission and goals

## Exterior requirements

The exterior of the library requires:

- hours of operation prominently posted outside the library
- a well-lit exterior with signage visible from the street
- sufficient, well-lit parking located near or adjacent to the facility
- a convenient, safe book return location during the hours the library is closed

## Interior requirements

There should be adequate provision for:

- current and future connections for electrical, data and telephone (including the SuperNet)
- controlled temperatures and humidity for the benefit of patrons and staff as well as the protection of library property

- adequate lighting in all areas

In addition, the library requires:

- a well-designed interior with sufficient signage to allow self-directed use of the library
- adequate restroom facilities
- separate areas for staff workspace(s) and breaks

**Law standards**

The library meets current local safety and fire codes and is accessible to all members of the community, conforming to all federal and legislative requirements.

**Management standards**

The library has dedicated expenditures for general maintenance and upkeep, if in a municipal building, and capital improvements and facility maintenance, if owned by the library. The library has written policies and guidelines for maintaining and improving owned facilities or letters of understanding with municipal owners which define their working relationship.

A library provides a space for accessing and utilizing materials. The building size (in square meters per capita) may vary based on community size, community demand, and budget.

The following ‘rule of thumb’ factors have been used to determine facility size by major components (Adapted from work by Anders C. Dahlgren, President, Library Planning Associates, Inc., Wisconsin, with input from Standards and Best Practice Committee, Alberta libraries’ statistics and New South Wales Library Standards) Note that at the end of this section is a “Space Planning Worksheet.”

**Table 5: Factors to Calculate Facility Size**

Collection space	111 volumes per sq. meter (1 square foot for every 10 volumes/items) (1 square foot per 20 visual/items) (1 square foot per 29 music/items)
Patron space	2.7 sq. meters (30 square feet) per patron space at 5 patron spaces per 1,000 population
Staff space	13.9 sq. meters (150 square feet) per staff member
Public-access computer work space	2.3 sq. meters (25 sq. ft.) per workstation
Meeting room space	0.9 sq. meter (10 sq. ft.) per seat



Programming space	0.9 sq. meter (10 sq. ft.) per child
Non-assignable space	25% of net space
Multipurpose rooms	based on community service and program objectives

## Sustainable buildings

Sustainability should be a part of every library's facility planning. Lower utility bills, reduced environmental impact and improved performance meet the triple bottom line of sustainability: financial, social and environmental.

Leadership in Energy and Environmental Design (LEED) is the most widely accepted rating system for sustainable buildings in North America.

LEED promotes a whole-building approach to sustainability by recognizing performance in five key areas of human and environmental health:

- sustainable site development
- water efficiency
- energy efficiency
- materials selection
- indoor environmental quality

Studies demonstrate better learning, health and work performance in buildings that incorporate LEED elements, such as increased natural light and improved air quality. Integrated design and life-cycle cost management are keys to controlling costs.

Certification is based on the total point score achieved, following an independent review and an audit of selected credits. With four possible levels of certification (certified, silver, gold and platinum), LEED® is flexible enough to accommodate a wide range of green building strategies that best fit the constraints and goals of particular projects.

The Alberta Government has affirmed its commitment to environmentally friendly building design by adopting the LEED Silver environmental standard for government buildings, under the LEED Green Building Rating System. LEED Silver buildings cost up to five per cent more than conventional buildings but are up to 45 per cent more energy efficient than the standard benchmark. The premium in initial cost can be returned in about seven years through energy savings alone as well as through improvements in productivity.

LEED is administered in Canada by the Canada Green Building Council.

# Space Planning Worksheet

(The following chart is a useful tool to assist boards and staff in their deliberations)

Library \_\_\_\_\_

Person completing form \_\_\_\_\_ Date \_\_\_\_\_

[Note: This chart uses square footage at this time. A future chart will be in square meters.]

## DESIGN POPULATION

- 1
- a. Current local population (for comparison only) \_\_\_\_\_
  - b. Projected local population \_\_\_\_\_
  - c. Projected nonresident service population \_\_\_\_\_
  - d. **TOTAL (b + c) =** \_\_\_\_\_

## COLLECTION SPACE

- 2
- a. Books: # of volumes \_\_\_\_\_ /10 = \_\_\_\_\_ sq.ft
  - b. Audio Media: # of items \_\_\_\_\_ /10 = \_\_\_\_\_ sq.ft
  - c. Visual Media: # of items \_\_\_\_\_ /10 = \_\_\_\_\_ sq.ft
  - d. Periodical display: # of titles \_\_\_\_\_ /1.5 = \_\_\_\_\_ sq.ft
  - e. Periodical storage: # of titles \_\_\_\_\_ /0.5 x # of years retained = \_\_\_\_\_ sq.ft
  - f. **TOTAL (a+b+c+d+e) =** \_\_\_\_\_ **sq.ft**

## PATRON SEATING SPACE

- 3
- a. Projected population (from Step 1d) \_\_\_\_\_
  - b. 5 seats/each 1000 people \_\_\_\_\_ seats
  - c. # of seats \_\_\_\_\_ x 30 = \_\_\_\_\_ sq.ft

## STAFF WORK SPACE

- 4
- a. # of workstations \_\_\_\_\_ x 125 = \_\_\_\_\_ sq.ft

## MEETING ROOM SPACE

- 5
- a. General meeting: # of seats \_\_\_\_\_ x 10 = \_\_\_\_\_ sq.ft
  - b. Conference room: # of seats \_\_\_\_\_ x 30 = \_\_\_\_\_ sq.ft
  - c. Children's programs: # of seats \_\_\_\_\_ x 10 = \_\_\_\_\_ sq.ft
  - d. Computer training lab \_\_\_\_\_ x 50 = \_\_\_\_\_ sq.ft.

e. **TOTAL (a+b+c+d)** = \_\_\_\_\_ **sq.ft**

**SPECIAL USE SPACE:** Special use space must be allotted for elements of an individual library's program of service or for special types of furnishings such as index tables, newspaper racks, pamphlet files, or photocopiers, refreshment area or staff break room. Special use space typically constitutes about 12 per cent of the overall gross area.

- 6 a. Collection space (from 2f) \_\_\_\_\_ sq.ft
- patron seating space (from 3c) \_\_\_\_\_ sq.ft
- staff work space (from 4a) \_\_\_\_\_ sq.ft
- meeting room space (from 5e) \_\_\_\_\_ sq.ft
- b. **SUBTOTAL 1** (sum of 6a items) = \_\_\_\_\_ sq.ft
- c. Multiply **SUBTOTAL 1** BY 0.1 = \_\_\_\_\_ sq.ft

**NON-ASSIGNABLE SPACE:** Some representative types of non-assignable space are furnace rooms, janitor's closets, storage rooms, vestibules, corridors, stairwells, elevator shafts, and rest rooms. Non-assignable space generally comprises about 25 per cent of the gross square footage of the finished building.

- 7 a. SUBTOTAL 1 (from 6b) \_\_\_\_\_ sq.ft
- b. Special-use space (from 6c) \_\_\_\_\_ sq.ft
- c. **SUBTOTAL 2** (a + b) = \_\_\_\_\_ sq.ft
- d. Multiply **SUBTOTAL 2** by 0.25 = \_\_\_\_\_ sq.ft

**PUBLIC ACCESS COMPUTER WORK SPACE**

- 8 a. # of workstations \_\_\_\_\_ x 35 = \_\_\_\_\_ sq.ft

**PUTTING IT ALL TOGETHER**

- 9 a. Collection space (from 2f) \_\_\_\_\_ sq.ft
- b. Patron seating space (from 3c) \_\_\_\_\_ sq.ft
- c. Staff work space (from 4a) \_\_\_\_\_ sq.ft
- d. Meeting room space (from 5e) \_\_\_\_\_ sq.ft
- e. Special use space (from 6c) \_\_\_\_\_ sq.ft
- f. Non-assignable space (from 7d) \_\_\_\_\_ sq.ft
- g. Public access computer work space (from 8a) \_\_\_\_\_ sq.ft
- h. **GROSS AREA NEEDED (a+b+c+d+e+f+g)** = \_\_\_\_\_ **sq.ft**

To convert square feet to square meters: multiply square feet by .0929 (i.e., 525 square feet = 48.77 sq. m.).

# Acronyms/Definitions

AAQ	Ask A Question (Alberta provincial virtual reference service)
ALC	Alberta Library Conference
ALTA	Alberta Library Trustees Association
APLEN	Alberta Public Library Electronic Network
CLA	Canadian Library Association
CULC	Canadian Urban Libraries Council
DDC	Dewey Decimal Classification
FOIP	<i>Freedom of Information and Protection of Privacy Act</i>
FTE	Full-time equivalent, based on a 35-hour work week (1820 hours/year)
ILS	Integrated Library System
LAA	Library Association of Alberta
LAN	Local Area Network
Library technician	Two-year diploma in library or information studies from a technical institute or community college
LOA	Library Operations Assistant - certificate from the Southern Alberta Institute of Technology's Rural Library Training Program
MA	Municipal Affairs (Public Library Services Branch)
Median	In the middle: having as many above as below a certain number
MLS/MLIS	Post graduate degree in library studies, library science or information science from an accredited university
NetSpeed	Annual library technology conference in Alberta
Node	There are 16 library boards that have been identified by Alberta Municipal Affairs as partners in the Provincial Resource Sharing Network.
Population	The official population numbers provided annually by Alberta Municipal Affairs for the municipality which established the library

	by bylaw
Public Libraries	Municipal libraries as defined in the <i>Libraries Act</i>
RAID	Redundancy of disk drives
Regional library system	This document uses the term “library system” as defined under Part 2 of the <i>Libraries Act</i> : a library system established as such or a regional library continued as a library system This document uses the term regional library systems as a generic term for the seven library systems in Alberta.
RDA	Resource Description and Access
RPA	Remote User Authentication
RSS	Resource Sharing Software
SSL	Secure Socket Layer
TAL	The Alberta Library: a consortium of public, university, college and other libraries in Alberta
TAL Online	Online access to search the catalogues of over 232 libraries in Alberta
VOIP	Voice-Over-Internet- Proxy

# Contacts

**Alberta Municipal Affairs  
Public Library Services Branch**

8th Floor, Standard Life Centre  
10405 Jasper Avenue  
Edmonton Alberta T5J 4R7

Toll-free: 310-0000

Telephone: 780- 427-4871

Fax: 780-415-8594

Website: [www.albertalibraries.ca](http://www.albertalibraries.ca)

<p><b>Chinook Arch Regional Library System</b> 2902 – 7 Avenue N. Lethbridge, AB T1H 5C6 Telephone: 403-380-1500 <a href="http://www.chinookarch.ca">www.chinookarch.ca</a></p>	<p><b>Peace Library System</b> 8301 – 110 Street Grande Prairie, AB T8W 6T2 Telephone: 780-538-4656 <a href="http://www.peacelibrarysystem.ab.ca">www.peacelibrarysystem.ab.ca</a></p>
<p><b>Marigold Library System</b> 710 – 2nd Street Strathmore, AB T1P 1K4 Telephone: 403-934-5334 <a href="http://www.marigold.ab.ca">www.marigold.ab.ca</a></p>	<p><b>Shortgrass Library System</b> 2375 – 10 Avenue S.W. Medicine Hat, AB T1A 8G2 Telephone: 403-529-0550 <a href="http://www.shortgrass.ca">www.shortgrass.ca</a></p>
<p><b>Northern Lights Library System</b> Bag 8 Elk Point, AB T0A 1A0 Telephone: 780-724-2596 <a href="http://www.nlls.ab.ca">www.nlls.ab.ca</a></p>	<p><b>Yellowhead Regional Library</b> Box 400, 433 King Street Spruce Grove, AB T7X 2Y1 Telephone: 780-962-2003 <a href="http://www.yrl.ab.ca">www.yrl.ab.ca</a></p>
<p><b>Parkland Regional Library</b> 5404 – 56 Avenue Lacombe, AB T4L 1G1 Telephone: 403-782-3850 <a href="http://www.prl.ab.ca">www.prl.ab.ca</a></p>	<p><b>Other nodes:</b> Medicine Hat Public Library Red Deer Public Library Calgary Public Library Edmonton Public Library Grande Prairie Public Library County of Strathcona Public Library RM of Wood Buffalo Public Library Lethbridge Public Library St. Albert Public Library</p>

# Additional Resources

## Governance

Bourgeois, Donald J., *Charities and Not-for-Profit Administration and Governance Handbook*, Butterworths Canada Ltd, 2001

*Developing Policy*, Board Development Program, September 2002

*Helpful Information for Meeting Minimum Public Library Standards*, The Library Development/Public Library System Directors Organization Minimum Standards Task Force, New York State Library, 2002

*In Service to Iowa: Public Library Measures of Quality, 4th ed.*, State Library of Iowa, 2004

Kelly, Hugh M., *Duties and Responsibilities of Directors of Not-for-Profit Organizations*, CSAE Monograph Series, 2004, Canadian Society of Association Executives

*Kentucky Public Library Standards: Direction and Service for the 21st Century, 3rd Ed.* Kentucky Public Library Association, March 2009

*Library Bylaws: Questions to Ask*, Alberta Municipal Affairs, Public Library Services Branch 2008

*Missouri Public Library Standards: An Implementation Plan*, May 2005

*Wisconsin Public Library Standards, 4th ed.*

## Personnel

*The Canadian Code for Volunteer Involvement* (© Volunteer Canada, 2006) (Copyright waived for charitable and voluntary organizations, and for non-commercial use.)

*Competency Tool Kit: Information Resources Management Specialists in Archives, Libraries and Records Management*. Cultural Human Resources Council: Ottawa, ON, 2002

*Ontario Public Library Guidelines*, Fourth Edition: Sudbury, ON: Ontario Library Services-North, 2007. <http://www.olsn.ca/Guidelines/OPLG.aspx>

*Public Libraries Housed in Schools Facilities Report*. Prepared by the Committee on Public Libraries Housed In Schools. December 2006

*Public Library Standards: A Review of Standards and Guidelines for the 50 States of the U.S.* FOR Colorado, Mississippi and Hawaii State Libraries. Mosaic Knowledge Networks. April 2003

*Queensland Public Library Standards and Guidelines* (Revised May 2008). State Library of Queensland. [www.slq.qld.gov.au](http://www.slq.qld.gov.au)

*Standards for Nova Scotia Regional Public Libraries* (rev. ed.). Nova Scotia: The Working Group, 2001.

*Texas Public Library Standards*. Texas Library Association, 2004.

### **Resource Sharing**

Boucher, Sandra, *Interlibrary Loan Practices Handbook*, ALA, 1997

Hilyer, Lee Andrew, *Interlibrary Loan and Document Delivery*, 2006, The Hawthorn Information Press

*Interlibrary Loan Policy - Interlibrary Loans (ILL) at Library and Archives Canada*, Library and Archives Canada, [www.collectionscanada.gc.ca/ill](http://www.collectionscanada.gc.ca/ill)

### **Technology**

*Alberta Public Library Technology Framework* (April 2010)

APLEN Technology Plan

Technology Toolkit for not for profit organizations

[Regional library system] Technology Plan

[Regional library system] Policies

[Local public library] Plan of Service, Technology Plan, Technology Policies

*APLEN Core Competencies for Technology*

### **Facilities**

Alberta Public Library Statistics 2008

Living Learning Libraries: Standards and guidelines for NSW public libraries, 2<sup>nd</sup> Edition; Library Council of New South Wales, December 2009

Colorado Dept. of Education, Colorado State Library  
[www.cde.state.co.us/cdelib/Standards/FullText/Facilities.htm](http://www.cde.state.co.us/cdelib/Standards/FullText/Facilities.htm)

Dahlgren, Anders C., "Public Library Space Needs: A Planning Outline /2009", Wisconsin Department of Public Instruction, 2009

*Texas State Library and Archives Commission: CREW: A Weeding Manual for Modern Libraries*.

*Public Library Statistics 2008*, Alberta Municipal Affairs, Public Library Services Branch



## **General**

The *Alberta Libraries Act Chapter L-11 2000: A Guide to the Legislation*. Edmonton, AB, Alberta Municipal Affairs, 2008.

The *Alberta Libraries Act Chapter L-11: The Libraries Regulation AR/41/98*. Edmonton, AB, Alberta Municipal Affairs, 2008.

*The Canadian Code for Volunteer Involvement* (Volunteer Canada, 2006©) (Copyright waived for charitable and voluntary organizations, and for non-commercial use.)

*Ontario Public Library Guidelines*, Fourth Edition: Sudbury, ON: Ontario Library Services-North, 2007. <http://www.olsn.ca/Guidelines/OPLG.aspx>

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*Public Library Standards: A Review of Standards and Guidelines for the 50 States of the U.S.* for Colorado, Mississippi and Hawaii State Libraries. Mosaic Knowledge Networks. April 2003

*Standards for Nova Scotia Regional Public Libraries*  
<http://www.library.ns.ca/files/standards.pdf>

*Wisconsin Department of Public Instruction: Wisconsin Public Library Standards Fifth edition*, 2010. <http://dpi.wi.gov/pld/standard.html>

*Public Library Standards {Montana} {2006}a*  
[http://msl.state.mt.us/For\\_Librarians/For\\_Public\\_Librarians/standards/adminrules.pdf](http://msl.state.mt.us/For_Librarians/For_Public_Librarians/standards/adminrules.pdf)

## **Core Competencies for Librarians**

*Library support staff.com*

<http://librarysupportstaff.com/4competency3.html>

*Ohio Public Library Core Competencies*

<http://www.olc.org/pdf/core.pdf>

*Competencies for Librarians Serving Children in Public Libraries, Revised Edition*

<http://www.ala.org/ala/mgrps/divs/alsc/edcareers/alsccorecomps/index.cfm>

*ALA's Core Competences of Librarianship*

<http://www.ala.org/ala/educationcareers/careers/corecomp/corecompetences/finalcorecompstat09.pdf>

*Youth Services Librarians Roles and Competencies*

<http://www.arrowhead.lib.mn.us/renewal/youth.htm>

*Social Networking Competencies for Librarians and Community Managers*

<http://steve-dale.net/2009/05/29/social-networking-competencies-for-librarians-and-community-managers/>

*Core Technology Competencies for Librarians and Library Staff: A LITA Guide.* Susan M. Thompson, editor. Neal-Schuman Publishers, 2009

# **Part 3**

# **APPENDICES**

# APPENDICES

Appendix #1	Draft of a Joint Operational Agreement between a Public Library Board and School District
Appendix #2	Collection Averages
Appendix #3	Hours of Opening Averages
Appendix #4	Facilities Averages
Appendix #5	Facility Guidelines for a Branch in a Large Community (over 50,000)

**Note:** There are only two libraries that serve a 100,000+ population.

Calgary and Edmonton Public Libraries currently use the *Canadian Urban Libraries Council Statistics* as one of their guidelines for their infrastructure and comparative purposes.

## **Appendix #1**

### **Draft of a Joint Operational Agreement between a Public Library Board and School District**

#### Agreement for the Operation of a Public Library Housed in a School Facility

Memorandum of Agreement made this: \_\_\_\_\_

BETWEEN

THE (Name of Municipality) LIBRARY BOARD,  
established under the Ministerial order, under Part 1 of the *Libraries Act*, Chapter L-11 (hereinafter referred to as the "Library Board")

-and-

THE BOARD OF TRUSTEES OF THE (Example) School Division  
(hereinafter referred to as the "School Division")

WHEREAS the Library Board serves the cultural, educational, informational and recreational needs of the entire community from preschoolers to senior citizens and has designed its staffing, collections and services to meet the needs of a widely diversified clientele whose participation and use are entirely voluntary;

AND WHEREAS the primary responsibility of the \_\_\_\_\_ School Library is to the educational program of the school, the curriculum, the teachers and the students. The principal, teachers and the library personnel share the responsibility for designing and implementing an effective program which integrates the library's resources and services with the curricular needs of the school.

AND WHEREAS the School Division's library staffing, collection and programs are geared to serving a specific group of patrons engaged in specialized tasks, in a timely manner and on a compulsory basis;

AND WHEREAS the Library Board and the School Division each has a collection of library materials which it desires to consolidate with the collection of the other in order that better library service may be made available to all residents of the community of (Sample) and surrounding areas and the Students and staff of the (Sample) School;

AND WHEREAS Part 3, Section 17 of the Alberta *Libraries Regulation* AR141/98 states that:

- "A municipal board shall not operate a library housed in a school unless
- (a) the municipal board enters into an agreement with the school authority that sets out the responsibilities of the municipal board and the school authority for the operation of the library, including the responsibilities of employees and volunteers of both;
  - (b) the municipal board has its own bank account and signing officers, none of whom are employees of the school authority; and
  - (c) the library is open to the public outside of the hours during which the school is in operation for regular classes, including being open during evenings or weekends or both, and during the summer."

AND WHEREAS each party has resolved to enter into an agreement providing for the terms and conditions under which the libraries of the parties may be consolidated and established, maintained and operated as a joint library.

AND WHEREAS copies of the resolutions of the Library Board and the School Division respecting their desire to form a joint library are attached and referred hereto as Appendix "--", and forms a part of this agreement.

AND WHEREAS this agreement supersedes other agreements entered into by either or both parties in respect to points contained in this agreement.

NOW THEREFORE the parties hereto hereby agree as follows:

### **JOINT ADVISORY COMMITTEE**

1. A Joint Advisory Committee shall be established which shall be responsible for developing and recommending policies for the combined library, for establishing library procedures, and for overseeing library operations. The committee shall be comprised of (*insert number*) Library Board members, [*insert number*] regional library representatives (if applicable), the school librarian, the public librarian, and the school principal.
2. A committee consisting of two representatives from the Library Board, the Deputy Superintendent or his or her designate from the School Division, one trustee on behalf of the School Division, and a representative of the regional library system (if applicable) will be struck to review any concerns or complaints which cannot be satisfactorily resolved in accordance with normal policies and procedures at the local level. The parties acknowledge and agree that the Committee can be comprised of any other individuals deemed appropriate, based upon mutual agreement of the parties.

### **BUDGET**

3. The Library Board and the School Division shall maintain separate operating budgets for personnel, stationery, library supplies and collection development sufficient to maintain their respective collections and services. Each party shall develop separate capital budgets for furniture and equipment, but acknowledge and agree that they shall, to the extent possible, jointly cooperate in the planning process involving major purchases or expenditures.

### **STAFFING**

4. The School Division shall provide such staff as may be required to administer to the needs of those using the library during school hours. The responsibilities of this person is listed in Appendix "--" which is attached hereto and forms a part of this agreement.
5. The Library Board shall provide such staff as may be required to administer to the needs of those using the library during public library hours. The responsibilities of this person are listed in the Appendix which is attached hereto.
6. The Library Board shall provide overall supervision and evaluation of the public librarian.
7. The school principal shall provide supervision of the school librarian.
8. In the event that the School Division and Library Board positions are filled by one individual employee of the School Division, the School Division shall make this person available without loss of pay, to attend up to (3) regional meetings and workshops per year. Each of the parties acknowledges and agrees that they shall use their best efforts to ensure that adequate notice is provided to the School Division principal to ensure that adequate coverage of the school library is in place, for any such absences of this individual.

## **FACILITIES**

9. The library shall be established and operated in the (Sample) School at the expense of the School Division in a room, adequate for the purpose. The facilities shall be:
  - a) open to the public outside of the hours during which the school is in operation for regular classes, as set out in Appendix “--“;
  - b) readily accessible to the proper offices and facilities, including washrooms;
  - c) maintained, heated and cleaned by the School Division;
  - d) properly designated by exterior and interior signage; and
  - e) accessible to members of the (Name of Municipality) Library Board or staff for governing or administrative purposes.
10. The School Division shall have the sole responsibility for approving renovations and upgrades to the Library facility including wiring for telecommunications. Access to and bandwidth of telecommunication is the right of each party.
11. Library Board staff shall be provided with a key and necessary security codes to access the public library outside of school hours. Orientation in safety/security procedures will be provided by the School Division.
12. In the event additional space is needed or the existing space needs to be renovated, the parties shall mutually agree on how costs are to be allocated or recovered.

## **OWNERSHIP OF PROPERTY AND INSURANCE**

13. Any library item placed in the library by a party to this agreement, once this agreement is in effect, or added to the collection by either party, subsequent to the execution of this agreement, shall remain the property of that party.
14. Each library item shall be designated as the property of one or the other of the parties by the placement of an imprint of the ownership stamp of the appropriate party on or in the item, as well as the appropriate placed label. The School Division may contract with the Library Board or Library System to record its materials in the union catalogue.
15. Updated property inventories, other than of libraries’ materials, will be filed annually with the Library Board and the School Division.
16. Each of the parties shall maintain sufficient insurance to cover the contents of their respective library collections. The School Division will maintain sufficient building insurance against loss or damage by fire, replacement of glass, burglary and extended perils in such amount as it deems necessary. Each of the parties shall also maintain comprehensive general liability insurance against claims of personal injury, death or property damage occurring within the premises, such insurance to afford protection to a limit not less than two million dollars per occurrence. Any such policy shall provide thirty (30) days notice of material alterations, cancellation or termination. Each party acknowledges and agrees to make available for review to the other party copies of their insurance policies.

## **COLLECTION AND RESOURCE SHARING POLICY**

17. Each party shall develop policies for the development of their respective collections. Selection and deselection will be made by authorized personnel in accordance with the approved collection policy. Each party agrees to adhere to one another's collection policy as appropriate to the users’ needs. Up-to-date copies of each collection policy will be maintained at the library for the benefit of staff and library patrons.
18. Challenged materials shall be dealt with by the respective owner of the challenged material in accordance with his own policy dealing with materials challenged by a third party.
19. The collections of the parties shall be consolidated into one stock, interfiled and labeled accordingly, and shall be made available for circulation to all holders of valid Sample Public Library cards as well as for interlibrary loan.



20. The School Division will honour reciprocal borrowing agreements signed by the Library Board on behalf of its borrowers.
21. The Library Board collection shall be made available to the School Division during school hours, if the designated School Library employee is trained in the use of the Library Board's equipment, as described in Appendix "--" which is attached hereto, as well as in the use of the automated library software, policies and procedures.
22. Selection and maintenance of a library management system will be the joint responsibility of the Library Board and the School Division.

### **EQUIPMENT AND COMPUTERS**

23. The School Division shall provide reasonable access to its equipment (telephone, facsimile machine, TV/DVD, overhead projectors, etc.) to the Library Board for administrative, programming and reference purposes at no charge to the Library Board, with the exception of long distance telecommunications charges directly related to, and initiated by the (Sample) Public Library, or its representatives, employees or agents, which shall be billed to and payable by the Library Board. The Library Board shall be responsible to make payment to the School Division for the use of the school's photocopier, in accordance with Board policy respecting the same. In exchange the public library will make available to the school its equipment listed in Appendix "--" for library purposes.
24. The Library Board shall be responsible for maintaining any public computer available for the purpose of accessing library titles, circulating library materials, public Internet and SuperNet access, and public library administration.
25. The Library Board will provide equipment, including computer equipment, to adequately serve the public needs, and may label it the property of the Library Board. During school hours, public library patrons will have priority access to computer equipment owned by the Library Board.
26. The Library Board shall put in place an Internet acceptable use policy for public library patrons.
27. The Library Board must maintain public access to the SuperNet to the level supported by the provincial government.

### **REVIEW OF THE AGREEMENT**

28. The parties agree to evaluate the effectiveness of the arrangement one year after the start of this agreement, and every two years thereafter.
29. The Agreement may be modified at any time with mutual agreement of the parties, upon 30 days written notice.

**TERMINATION**

30. The effective date of this agreement shall be from the 1<sup>st</sup> day of \_\_\_\_\_. This agreement will remain in force from year to year unless and until either party gives to the other party 12 months notice in writing of the intention to change or terminate this agreement.

31. In the event of termination for whatever reason, the parties acknowledge and agree that the parties to this agreement shall retain ownership of their respective collections and property.

IN WITNESS WHEREOF the parties hereto have executed this agreement by the duly authorized officers on the day and year first above written.

THE (Name of Municipality) LIBRARY BOARD,

Per: \_\_\_\_\_

Date: \_\_\_\_\_

Per: \_\_\_\_\_

THE BOARD OF TRUSTEES OF THE (Example) SCHOOL DIVISION

Per: \_\_\_\_\_

Date: \_\_\_\_\_

Per: \_\_\_\_\_

**APPENDICES TO AGREEMENT**

Documents to be attached to agreement

- Appendix A - Establishment Bylaw of Public Library Board
- Appendix B - Resolution of the (Name of Municipality) Library Board
- Appendix C - Resolution of the School Division
- Appendix D - Hours of Operation
- Appendix E - Inventories of Each Library
- Appendix F - School Library Manager Job Description
- Appendix G - Public Library Manager Job Description
- Appendix H - Policies

**Policies**

- Library Material Selection Policy (including Statement of Intellectual Freedom for Public Library Board)
- Library Material Selection Policy (Choice of Resources: Guidelines)
- Library Material Selection Policy (Deselection: Re. Evaluations)
- Library Material Selection Policy (Deselection: Weeding)
- Mission Statement of Public Library Board

## Appendix #2

### Collection Averages

**Book Collections:** As a general guide, an established book collection should be between 1.5 to 2.5 books per capita.

Population Category	# of Service Points	Median collection size	Average collection size	Sum collections / Service points	Lowest*	Highest*
<b>0-600</b>	59	8,682	9,634	9,634	2,937	27,234
<b>601-1,200</b>	41	8,931	10,484	10,484	4,158	49,908
<b>1,200-3,000</b>	40	14,513	15,774	14,590	5,693	27,390
<b>3,001-5,000</b>	18	19,753	20,804	17,336	10,352	31,710
<b>5,001-10,000</b>	41	31,128	30,213	21,370	17,788	49,973
<b>10,001-25,000</b>	41	43,252	43,469	27,565	18,632	90,432
<b>25,001-60,000</b>	7	78,559	86,745	49,569	150,890	38,973
<b>60,000-100,000</b>	8	176,430	171,344	107,089	95,418	228,196

\*As reflected in the statistics reported to Municipal Affairs for 2008.

**Non-print Collections:** Non-print collections include audiovisual and audio media collections.

Population Category	# of Service Points	Median collection size	Sum collections / Service points	% of collection	Lowest*	Highest*
<b>0-600</b>	59	505	577	6	0	2,706
<b>601 - 1,200</b>	41	360	536	5	0	2,641
<b>1,200-3,000</b>	40	845	1,113	7	0	4,562
<b>3,001-5,000</b>	18	1,908	1,590	8	170	6,126
<b>5,001-10,000</b>	41	2,266	1,682	7	853	4,416
<b>10,001-25,000</b>	41	3,501	3,712	2,354	0	7,094
<b>25,001-60,000</b>	7	9,675	9,182	5,247	0	16,813
<b>60,000-100,000</b>	8	24,236	48,494	30,309	5,627	169,985

\*As reflected in the statistics reported to Municipal Affairs for 2008.

**Periodical Collections:** Periodicals include magazines, journals and newspapers in *print* format. The recommended retention rate for most periodicals is 12 months. For newspapers, the retention rate depends on local needs.

The chart below reflects periodical subscriptions in print format for circulation purposes and in house use. It does not reflect downloadable content or database access.

Population Category	# of Service Points	Median collection size	Average collection size	Sum collections / Service points	Lowest*	Highest*
<b>0-600</b>	59	14	18	18	0	85
<b>601 -1,200</b>	41	15	26	26	0	290
<b>1,200-3,000</b>	40	30	31	28	0	96
<b>3,001-5,000</b>	18	70	89	75	14	424
<b>5,001-10,000</b>	41	64	94	67	26	855
<b>10,001-25,000</b>	41	88	86	54	0	206
<b>25,001-60,000</b>	7	293	566	323	32	1,645
<b>60,000-100,000</b>	8	322	270	169	143	363

\*As reflected in the statistics reported to Municipal Affairs for 2008. Some of the statistical data received may include some electronic records.

Calgary and Edmonton Public Libraries currently use the Canadian Urban Libraries Council Statistics as one guideline in their collection development process.

## Appendix #3

### Hours of Opening: Averages

The following charts provide a benchmark of the ranges of actual hours of opening from *Alberta Public Library Statistics 2008*.

Libraries with no data and system service points are excluded from all calculations.

Average is determined by adding the hours together within the population category and dividing the sum by the number of libraries in that population category.

Median is defined as the middle value of a series of values arranged in order of size. In other words, one half of the libraries within the population category have a higher number of hours of opening and one half of the libraries within the population category have a lower number of hours of opening.

Population Category	# of Library Boards	# of Service Points	Average Hours Per week	Median Hours Per week	Highest Reported	Lowest Reported
<b>0-600</b>	60	60	21.1	20	43	2
<b>601 -1,200</b>	41	41	23	22.0	34	11.0
<b>1,201-3,000</b>	39 (1 n/a)	41	33	36.0	57	3.0
<b>3,001-5,000</b>	18 (3 n/a)	18	40	40.0	54	23.0
<b>5,001-10,000</b>	31 (2 n/a)	41	57	45.0	63	16.0
<b>10,001-25,000</b>	27 (1 n/a)	41	46	53.0	66	14.0
<b>25,001-60,000</b>	4	7	55	62	69	26
<b>60,001-100,000</b>	5	8	52	60	69	32
<b>Over 100,000 Calgary, Edmonton</b>	2	33	58	58	59	57
<b>TOTALS</b>	<b>227</b> (7 n/a)	<b>290</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>

### Hours of opening for public libraries housed in schools

No public libraries are housed in schools in populations over 30,000.

Population Category	#of Library Boards	#of Service Points	# of School Housed Service Points	Average Hours Per Week	Median Hours Per Week	Highest Reported Per Year	Lowest Reported Per Year
<b>0 - 600</b>	19	34	33	10.9	34	1,955	316
<b>601 – 1,200</b>	6	6	6	20.2	18.75	1,674	550
<b>1,201 – 3,000</b>	4	5	4	26.5	38.5	2,088	1,148
<b>3,001 – 5,000</b>	3	5	3	30.7	60	3,188	1,474
<b>5,001 – 10,000</b>	5	14	5	18.3	47.5	4,000	985
<b>10,001 – 60,000</b>	8	25	8	12.4	37	4,900	200
<b>TOTALS</b>	45	89	59	<b>N/A</b>			

## Appendix #4

### Facility Averages and Guidelines

The following chart provides a benchmark of the ranges of actual facility size from *Alberta Public Library Statistics 2008*.

Facility size is noted in square meters (m<sup>2</sup>).

Libraries with no facility data, or with no population data, are excluded from all calculations.

Average is determined by adding the sizes together within the population category and dividing the sum by the number of libraries in that population category.

Population Category	# of Library Boards	# of Service Points	Average Facility Size (m <sup>2</sup> )	Highest Reported Facilities Area (m <sup>2</sup> )	Lowest Reported Facilities Area (m <sup>2</sup> )
<b>0 - 600</b>	65	80	182.3	1,670.0	13.5
<b>601 - 1,200</b>	41	41	178.6	665.0	45.4
<b>1,201 - 3,000</b>	37	38	327.6	1,959.0	14.4
<b>3,001 - 5,000</b>	14	16	395.6	881.0	243.0
<b>5,001 - 10,000</b>	29	41	422.3	1,412.0	276.0
<b>10,001 - 50,000</b>	27	43	630.1	4,425.0	394.1
<b>50,001 - 100,000</b>	7	10	2,083.5	5,155.0	1,800.0
<b>100,000+*</b>	2	33	2,336.7	38,558.0	38,552.0
<b>TOTALS</b>	<b>222</b>	<b>302</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>

\*Boards with no service points, or facility data, or with no population data, are excluded from all calculations. This excluded 9 service points.

Calgary and Edmonton Public Libraries currently use the Canadian Urban Libraries Council Statistics as one guideline in their collection development process.

### Public Libraries Housed in Schools

There are many public libraries housed in schools in Alberta. We have pulled them from the above facility chart for comparative information. There were 59 public libraries housed in schools in Alberta in 2008, almost 20 per cent of the service points in Alberta. The majority are in small communities.

Population Category	# of Library Boards	# of Service Points*	# of School Housed Service Points*	Average Facility Size (m <sup>2</sup> )	Highest Reported Facilities Area (m <sup>2</sup> )	Lowest Reported Facilities Area (m <sup>2</sup> )
<b>0 - 600</b>	19	34	33	243.9	1,208	13.5
<b>601 – 1,200</b>	6	6	6	218.8	370	138.3
<b>1,201 – 3,000</b>	4	5	4	281	350	221
<b>3,001 – 5,000</b>	3	5	3	370.9	409	314.7
<b>5,001 – 10,000</b>	5	14	5	344.8	518.8	177.5
<b>10,001 – 50,000</b>	8	25	8	423	744.5	128
<b>School-Housed Public Libraries**</b>	45	89	59	285.8	1,504.9	13.5

\*The 45 boards have 89 service points, 59 of which are housed in schools.

\*\*Average of all school-housed libraries.

To convert square meters to square feet, multiply by 10.764



## **APPENDIX #5**

### **Facility Guideline for a Branch in a Large Community (over 50,000) (Courtesy of Edmonton Public Library)**

#### **INTRODUCTION**

In 1999, the Board of Trustees of the Edmonton Public Library adopted a new Mission Statement.

***“The Edmonton Public Library connects the people of Edmonton to the knowledge and cultures of the world.”***

The Board is committed to achieving this mission by maintaining and further developing a library network consisting of a central library and strategically-placed branches, as well as through the integration of technology into library service. Together, these approaches to the provision of library service are intended to enable:

- (a) **Access** to library services by **all** Edmonton residents, and
- (b) Provision of library services which are **responsive** to the needs of Edmonton residents.

To help achieve the foregoing, the Library has developed criteria for use when assessing the need for a new branch and its future location in the City. A two-step process will be followed consisting of:

- Step I** Determining the **needs** of residents in an area of the City for library services provided through a new or re-located library branch;
- Step II** Determining an appropriate **location** and **facility** from which such service can be provided.

#### **A MODEL FOR PUBLIC LIBRARY SERVICE DELIVERY**

To meet the needs of Edmontonians, Edmonton Public Library has developed a highly responsive and cost-effective model of service delivery.

*An integrated physical network of service points (a central library and 15 branches) serves populations from as small as 18,500 to that of the entire city. While each works to meet the needs of customers in its own area of the City, the central and branch libraries operate in a co-operative manner ensuring that residents have ready access to all materials and services available throughout the system. For instance, the combination of an efficient holds process and an integrated network of electronic resources, ensures that customers using any branch have access to all library holdings. This approach facilitates the development of one broad collection of materials, rather than many smaller duplicate collections across the City.*

There are two broad levels of service within this model:

- A. The central (Stanley A. Milner) library provides services:**
  - (i) to the entire City (including through the provision of centralized services to branches); and
  - (ii) to the downtown community.
  
- B. Branch libraries** provide services intended to meet the needs of residents within their local communities. Branches also share resources, services and expertise with one another and the central library.

This model recognizes the continuing the need for library facilities in neighborhood communities. Despite the integration of technology and electronic resources into library operations, the circulation of print and other materials, as well as visitations to the central and branch libraries, remain stable. Consequently, it is clear that people of all ages continue to use the library as a location within the community where they can read, study, learn, meet, relax and connect to the rest of the world.

## **TOWARDS NEW BRANCH DEVELOPMENT**

### **STEP I: DETERMINING NEEDS FOR ACCESS**

It is evident that, as Edmonton moves into the future, its population will shift (in terms of age, income, and location) and most probably grow. New neighborhood communities will *be* developed, while older existing communities will experience cycles of decline followed by regeneration.

The following factors will be considered when determining whether to develop a new branch library.

#### **(i) An Area's Current/Projected Population**

The current and projected population of an area is a major criterion in determining whether a branch library is required. A minimum existing population of 20,000, with the potential to grow to 30,000 or 35,000 within five years, is necessary to support a viable and cost effective branch library operation. This criterion is consistent with the practices of most other large Canadian public libraries.

#### **(ii) Potential Service Area Size/Distances From Other Branches**

It is generally accepted that, the further people reside from library service, the less likely they are to use that service. In Edmonton, a standard has been established whereby branches will be located not more than 5 km apart, thereby enabling each to have a service area radius of approximately 2 to 2.5 km. Exceptions occur in instances where natural and manmade barriers (river valley, railway tracks, freeways, etc.) affect resident travel patterns.

This standard is consistent with the results of a 1995 study of site criteria used by other Canadian public library systems. It revealed that the service area radius for branches serving populations of 25-45,000 averaged approximately

1.9 km. Data gathered at that time in Edmonton suggested that Library customers, on average, resided 1.9 km from the nearest branch library.

### **Levels of Service at Existing Branches**

The Edmonton Public Library employs a co-operative model in which the larger (District) branches provide support and expertise to small and medium sized (Community) branches. While these types of branches (District and Community) each provide standard levels of service, their collections, services and programs are also tailored to meet the needs of local communities. Consequently, the level of service offered at an existing branch would not necessarily preclude development of a new, adjacent branch.

To the contrary, in some instances EPL's large (District) branches are located in, or adjacent to, areas of ongoing population growth which has placed extreme pressure on existing collections, services, staff and facilities (as in the case of Southgate). In recent years, the development of new, Community branches has been intended to relieve the pressure, thereby enabling:

- (a) a more even distribution of library customers; and
- (b) more opportunities for staff to focus on service to customers.

### **(iii) Population Profile**

The mission of the Edmonton Public Library is to provide service to all Edmontonians. Consequently, population profile (age, income, education, etc.) is not necessarily the critical factor during Step I of the process. It will, however, always be a factor in later stages when collections, services and programs are developed to meet the needs of the local population.

There may be occasions, however, when population profile is the dominant criterion in determining whether to develop a new branch. For instance, it might be determined that some population pockets of low income/low education households have inadequate access to library and information services. (For example, getting to the library may not be affordable or encouraged by parents.) Although such populations may not meet the criteria previously noted (population size, and distance from existing branches), they may require nearby outlets/branches providing library service.

It should be noted, too, that over time the characteristics of a population in an area will change and, consequently, require changes in services offerings. Currently, branches of the Edmonton Public Library endeavor through a variety of means to be closely attuned to the needs of their communities. However, the changes in a community and/or its needs could, at some point, become so great as to require a significant change in facility or different means altogether of providing library services.

### **(iv) Summary**

In summary, the prime criteria for determining whether a new branch library is required in an area are:

- (a) an area population of 20,000 which is projected to grow to 30,000 to 35,000 within the next five years; and
- (b) no other branch library within 4 to 5 km.

Additionally, in some cases, particularly where small and distinct population pockets occur, population profile may become the over-riding criterion in deciding whether to develop a new branch library.

## STEP II: APPROPRIATE LOCATIONS AND FACILITIES

The Board will attempt to find the most cost effective solutions to the development of library branches, within the context of providing quality library services meeting the needs of Edmontonians as per the Mission Statement. In its efforts to find the best site for a branch library (whether leased or owned) the Board may engage in a process of public consultation.

### **(i) To Lease or Own**

The following will be considered when deciding whether to lease space for a new branch library facility or to purchase/build:

#### **(a) Long Term Cost/Benefits of Leased or Owned Property**

Whether by design or not, most public library facilities have a lifespan that exceeds 20 years. As of the start of 2000, Edmonton Public Library branches (whether original construction or rebuilt, leased or owned) had been on their current sites for an average of 30 years. Consequently, front-end decisions relative to site have long-term impacts upon the library. The cumulative costs of long term leasing (plus leasehold improvements) must be weighed against the costs of purchasing/building a facility. Experience shows that the payout period (the time in which cumulative rental and leasehold improvement costs match or exceed building costs) generally ranges from approximately five to 10 years. Therefore, in most situations, purchasing or building a facility should prove to be a smart business decision.

#### **(b) Expected Duration of Use of the Facility**

There may be occasions, depending upon a community's stage of development, when a branch is established as a transitional or interim step to a (larger or smaller) permanent facility. If this interim period is expected to be less than five years, consideration will be given to leasing, as the cumulative rental costs may be less than the cost of purchasing/building.

### **(ii) To Own**

When a decision has been made to purchase or build a library facility, the following criteria will be used in determining the location of the facility. It will be located:

1. In an area frequently visited by all segments of the community.
2. In high vehicular traffic areas with easy access and with convenient and inexpensive parking.
3. In high pedestrian traffic areas.
4. Close to public transportation.
5. In an area which permits high visibility and identification.
6. Beside or within a community focal point.
7. Co-housed with other city facilities and/or schools.

To assist in the evaluation process, the foregoing criteria have been weighted to enable the application of numerical values to sites under consideration so that they may be compared objectively. Please refer to Appendix #5 *Addendum*. Once the weighting process has been completed, cost will be the deciding factor, particularly when all other factors are equal.

**(iii) To Lease**

If a decision is made to lease space for a library facility, the criteria for Ownership (excepting item #7) will apply, in addition to the following:

1. The library is relatively self-contained with a separate entrance, utilities and perimeter security.
2. It will have clearly visible identification.
3. Hours of opening will be determined only by the Library Board.
4. The library has a convenient service entrance.
5. The library has input into decisions affecting the whole shared facility.
6. In the case of community centre locations, recreational activities are year-round rather than seasonal.

To assist in the evaluation process, the foregoing criteria have been weighted to enable the application of numerical values to lease sites under consideration so that they may be compared objectively. Please refer to Appendix A. Once the weighting process has been completed, cost will be the deciding factor, particularly when all other factors are equal.

**(iv) Other**

It is recognized that small population pockets will develop which are served by neither the central library nor existing branches. These population pockets can be expected to occur in some inner City areas, as well as elsewhere. To balance the needs of these residents against their small population size, it may be necessary to develop alternative means of providing service, whether through small “neighborhood” branch libraries or to implement innovative electronic solutions. As these would be “exceptions to the rule” rather than the “norm”, each case would be judged on its own merit.

**(v) Libraries for the Future**

**(a) Physical Facilities**

In the mid-1990’s, the Edmonton Public Library conducted a study of both its existing branch libraries and the projected requirements of branch library facilities of the future. Toward that end, a 10,000 square foot prototype library branch design was developed and used as the basis for the construction of three branches – Lessard, Woodcroft, and Riverbend.

As already noted, library branches do not quickly come and go. Instead, they become essential components of their communities, and in Edmonton generally reflect a community lifespan of 30 years or more. Consequently, the prototype branch must remain flexible to meet evolving needs for library services at the local community level. Additionally, branch libraries of the future will be easily accessible to those with physical limitations.

Despite changing technologies, branch libraries will continue to require space for hard copy collections (books, periodicals, and audio visual materials) well into the future. However, with a program of regular de-selection and collection upgrading, it is anticipated that space requirements for such collections will remain constant for some years to come.

Public areas of branch libraries must be flexible to meet community needs for:

- children's programming and meeting space,
- study space, and
- access to electronic resources.

Owing to the relatively small number of staff positions at a branch library, staff work areas must be in close proximity to one another, as well as to public access areas.

(b) *The Virtual Library*

It is a vision of the Edmonton Public Library to become a national leader in the integration of technology into library service. Electronic resources and technological access to information and services will not result in the demise of the library as a location. Rather, technology will be expanded and used to enhance customer access to library services, whether from within library branches, or from home, place of work, or other locations within the community. Using new tools, customers and staff will access information resources more effectively and communicate in new and innovative ways. Services offered electronically will be tailored to the individual needs of customers, recognizing the diversity of the community and the physical, social and economic barriers faced by its members.

As is the case today, there will continue to be communities, as well as pockets of community populations, that do not meet (and perhaps never will) the criteria for the development of branch libraries. The library will strive to find innovative ways in which to utilize technology for the provision of library services to those populations. An example of a possible solution might be the development of small, self-managed, electronic storefront or kiosk operations where customers will access information electronically. Alternatively, such operations may be small-scale blends of electronic and more traditional library services, such as a holds pick-up/drop-off service.

## **BRANCH LIFE EXPECTANCY AND RE-DEVELOPMENT**

Just as a community evolves, so must its local library branch. A branch may need to adjust to changing user needs by:

- changing its physical environment through expansion or renovation;
- moving to a more accessible location;
- closing so it can be replaced, rebuilt, or incorporated into a larger facility;
- closing due to decline of the community.

The criteria already outlined in this document, along with the facility's physical condition, will be used when analyzing whether to relocate, renovate or close an existing branch library.

## **REVIEW**

The Board of Trustees of Edmonton Public Library will review this *Branch Development Criteria* document every three years.

## **BIBLIOGRAPHY**

Barr Ryder Architects and Planners. *Edmonton Public Library: Prototypical branch library development and Woodcroft Branch Library cost comparison*. Edmonton, November 27, 1995.

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(b) LEASED FACILITY

<u>CRITERIA</u>	<u>SCORE</u> <u>(0 to 5)</u>	<u>WEIGHT</u>	<u>TOTAL</u>
Location frequently visited by all segments of community	_____	x 15	= _____
Vehicle access and parking	_____	x 15	= _____
Pedestrian traffic access	_____	x 15	= _____
Access to public transportation	_____	x 15	= _____
Visibility/ease of identification	_____	x 10	= _____
Proximity to a community focal point	_____	x 15	= _____
Self-contained site (separate entrance, utilities, security)	_____	x 5	= _____
Control over hours of opening	_____	x 15	= _____
Convenient service entrance	_____	x 5	= _____
Participation in decision-making (affecting the whole shared facility)	_____	x 5	= _____
Compatibility of other occupants (in community centre locations, are activities year-round or seasonal)	_____	x 15	= _____
		<b>TOTAL</b>	<b>= _____</b>