

An Analysis and Creation of New Policy and Procedure Documentation for the Fort St. John Public Library Association

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Executive summary

The Fort St John Public Library Association (FSJPLA) is a small organization that serves the City of Fort St John and surrounding area. It has a large patron base with limited resources as it is a Library Association and therefore relies on donors and grants to operate. The FSJPLA had a desire to update its 2009 Policy Manual to reflect its current strategic direction and provide up to date operational information to Board Trustees, staff and patrons.

In the literature information relating to policy and procedure drafting is available, and information relating to library structure and performance is also well documented. Writings specific to policy and procedures in a library setting are limited and as such, the researcher aimed to combine the policy and procedure information with library function and operations. Policies are the “what and why” of an organization and the procedure is the “how” (Campbell, 1998, P. 2-3). Policies and procedures can be combined or written as separate documents depending on the organization’s desires and the quantity and type of content placed into the documents.

Policy and Procedure topics and content can be determined based on organizational alignment and strategic planning along with an analysis of the operations to determine what is consistently being raised as an issue and could improve by having a policy or procedure define parameters, if there are topics that only a few individuals have knowledge of but they are key to the organizational function and if there are topics that create strife between parties that could benefit from documented clarification.

Policies and procedures must be well written, clear to all those using them and have appropriate up to date content, to ensure that they maintain relevancy and utility. There are four steps to policy and procedure creation: planning, analysis, research and prewriting (Campbell, 1998, p. 26). Even if pressed for time, the drafter should spend time in all four steps in order to meet the intent of creating high quality policy and procedure documents. Once the policies and procedures are drafted they must go through a review process for verification, validation, proofing and approval. The approval means the policy and/or procedure is ready for implementation. Once implemented there must be a review process to make sure policy and procedures are kept up to date and relevant.

The FSJPLA practices the principles and roles of the Canadian Library Association and the BC Library Association as well as being an active member of the North East Library Federation (NELF), in which it works with regional libraries to help optimize databases, coordinate regional programming, increase consortium purchases and share ideas, information and staff training (NELF, 2013, p. 9-11).

Libraries across Canada have varying scopes of publicly available policy and procedure documents. To align the FSJPLA with other libraries and gain an understanding of what policies and procedures are often applicable to libraries, as well as determine what policies and procedures were not readily available amongst libraries, a scan was completed comparing eleven libraries in Canada. There was also an analysis of the 2009 Policy Manual to which the FSJPLA was still referencing. From this scan and a scan of other organizational policies and procedures, in collaboration with the FSJPLA Director of Library Services, the following topics were chosen to be the focus of 2015 policy and procedure manual:

- A policy and procedure about Policy and Procedures;
- A Board Member Policy and Procedure;
- Safety Policy and Procedure;
- Library Acquisitions and Disposals Policy;
- Computer and Internet Use Policy;
- FSJPLA Website and Social Media Use;
- Membership, Borrowing and Fees Policy;
- General Operations Policy;
- Accessibility and Inclusion Policy;
- Access to Information and the Protection of Privacy Policy;
- Building acquisitions and contract management (This policy was rolled into the Financial Policy);
- Advertising, sponsorship and donations policy;
- Financial Policy and Procedures.

The policy and procedures were drafted after a review of some key legislation applicable to the FSJPLA, including the Library Act, Freedom of Information and Protection of Privacy Policy Act (FOIPPA), workplace legislation, the Constitution Act, the Charter of Rights and Freedoms and Canada's Anti-Spam Legislation. The drafting was done with the intent of supporting the FSJPLA Strategic Plan goals and performance measures.

The 2015 Policy and Procedures Manual is being created as a basis for the FSJPLA to move forward in implementing a strong policy and procedure framework. The manual sets protocols for ensuring the policies and procedures are kept up to date and that it is used by its intended audience. The 2015 Manual is not created to be a static document and it is anticipated to grow over time as well as have some out of date policies and procedures removed or modified. The 2015 Manual provides the FSJPLA with operational support and structure as they proceed forward into their next strategic planning cycle.

1.0 Introduction

The Fort St John Public Library Association (FSJPLA) is a small organization that is an essential part of the northern community it serves. Located in northeast British Columbia (BC), the FSJPLA provides service to the small city of Fort St John as well as the surrounding area. In 2014, the FSJPLA began a redraft of its 2009 Policy Manual to provide direction to the Board, staff, patrons and members. This direction would provide the FSJPLA with more consistent approaches, allowing for less time being utilized resolving repetitive issues or dealing with complaints of inconsistent approaches.

With funding constraints, clients to serve and staff to organize, the library must be run in a strategic and efficient manner. The FSJPLA's Strategic Plan provides the basis for library operations and identifies three overarching themes: a growing and diversifying community; a constantly changing service environment; and obtaining sustainable funding (Fort St John Public Library [FSJPL], 2012, p.5). One initiative to achieve the strategic goals is to update the FSJPLA's 2009 Policy Manual (2009 Manual), to help create a more efficient, consistent operating environment. This paper seeks to address how the manual should be written, what content should be included and equally as important, what content should be excluded.

This project begins by reviewing how the FSJPLA is set up, who they serve, who they work together with and some of the challenges they face. In order to understand the library operating structure, the FSJPLA governance is explained, providing an understanding of the framework it is founded on. The literature review will inform the reader of what policies and procedures are, how topics for policies and procedures are chosen and how to make them effective, including aligning them with the organizational strategic direction. The literature review also examines libraries in BC and Canada and how the FSJPLA is aligned with related federal, provincial and regional associations. Knowing how to write effective policies and procedures, along with the FSJPLA framework provides the basis in which this project formulated results and information relating to them. The results and discussion form the basis for which the new FSJPLA Policy and Procedure Manual was created.

2.0 Background

2.1 The Fort St John Public Library Association

In order to comprehend how and why policies and procedures are important to an organization like the FSJPLA, it is imperative to have knowledge of the library's purpose and operations, the FSJPLA history, statutes that apply to it and its operating environment.

The FSJPLA provides services to the City of Fort St John, along with Areas B and C of the Peace River Regional District, in northeast British Columbia (BC). Figure 1 shows the City of Fort St John's location in relation to the rest of BC. Located in northeast BC, it is an isolated city, with the closest "large city" amenities located in Grande Prairie, Alberta. Figure 2 is a demonstration of the large geographic extent and numerous communities of which Areas B and C of the regional district covers. It is estimated that the City of Fort St John services 60,000 people while its tax base population is under 19,000 (City of Fort St John, 2013). As an association, the FSJPLA does not have a guaranteed funding source from the municipality. In recent years the City of Fort St John has provided 51% of the library's funding (FSJPLA, 2012). The area's main economic driver is the oil and gas industry, along with agriculture, forestry and construction (Employment Connections, 2013). The oil and gas industry has a history of strong fluctuations, based on gas prices and supply. When gas prices are high, the FSJPLA can experience high volumes of patrons, along with an easier ability to raise funds from donors. During economic slowdowns, donors are not as liberal with funding but the need in the community can remain steady if not increase as individuals may require resources for re-training or job search functions.



Figure 1: The location of Fort St John and The Peace River Regional District in relation to the Province of British Columbia (British Columbia, 2015b).

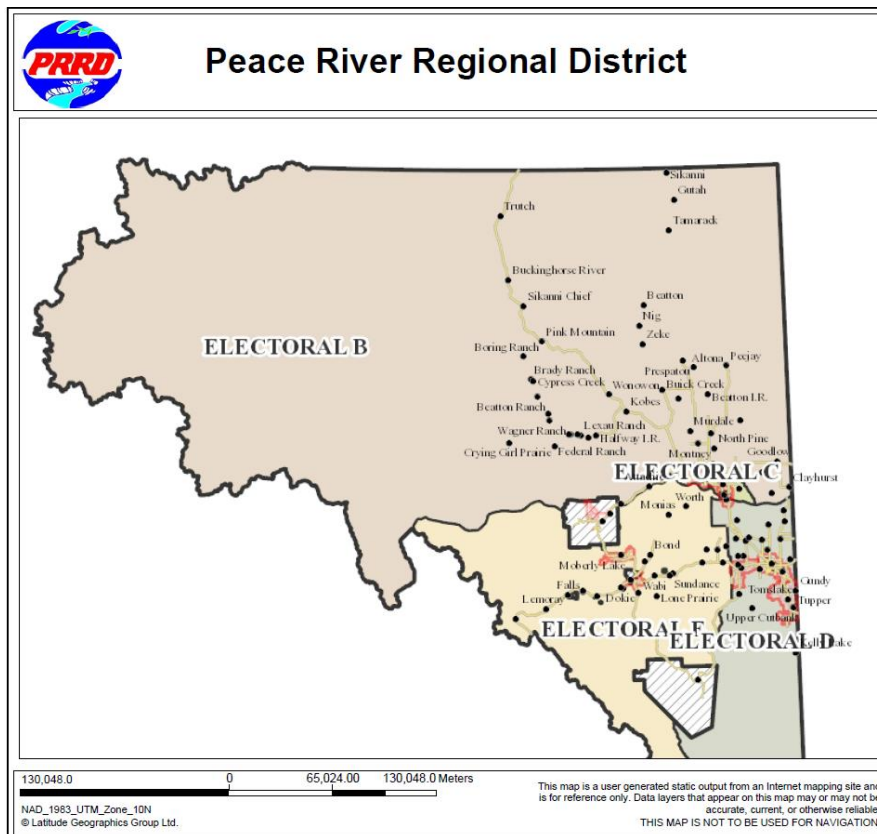


Figure 2: The Electoral Areas B and C of the Peace River Regional District (PRRD, 2015).

The FSJPLA Strategic Plan 2012-2015 outlines five strategic goals and initiatives: (1) Continue to provide top-notch service to our customers; (2) Deliver programming that meets the needs and diversity of our community; (3) Increase the awareness and usage of the library's services; (4) Maintain financial stability through good stakeholder relations and a broadened funding base and (5) Support staff in maintaining the skills and capacity to deliver great services and programming. The FSJPLA has performance measures aligned with the Strategic Plan goals, these measures are:

- To provide top-notch service to customers, patron satisfaction will be measured;
- To meet the needs of the diverse community, the FSJPLA will measure participation and satisfaction in programs; and
- To measure the increased awareness of library services website usage and library visits will be tracked. To meet the previous goals, the library will measure funding growth and staff engagement (FSJPLA, 2012).

Fort St John and the surrounding communities have a transient population and have recently experienced the lowest unemployment rate in BC, creating chronic labour shortages and high turnover for employers (Employment Connections, 2013). The FSJPLA has been the recipient of this reality. In the past seven years the FJSPA has had three Directors of Library Services (K. France, personal communication, 2015). This example of high staff turnover is indicative of organizations in northeast BC due to the location, long winters, high cost of living, plentiful jobs and the transient nature of the workforce. Around Fort St John, there is currently a slowdown in the oil and gas sector that is not projected to be long term. With the Provincial and Federal government granting the proposed Site C Clean Energy Project Environmental Assessment Certificates and the proposed development of Liquefied Natural Gas (LNG) Facilities and associated pipelines in BC, it is anticipated that Fort St John and area population will continue to grow, placing more pressure on the current infrastructure and staff of the FSJPLA.

Libraries are more than a place to borrow books from; the FSJPLA offers a multitude of services. For the library to remain a vital entity in the Fort St John area, it has added a number of programs and services over time. It offers several programs, many specific to families and children, such as "Mother Goose on the Loose" and "Crafternoons". It also offers digital books, audiobooks, magazines and online resources such as travel and ancestry databases (FSJPLA, 2015). The library also provides computers with internet access, free wireless internet, computer training, free book delivery to homebound patrons and exam invigilation (FSJPLA, 2012). The FSJPLA has been proactive in keeping up with the changing face of libraries in Canada. They have redesigned their website to improve ease of access and have a digital collection and online programs that are available to all members. The FSJPLA provides public access to computers which have seen a growth in use from 8,600 visits in 2013 to 13,900 in 2014 (Alaska Highway News, 2015), demonstrating their importance to the community.

The FSJPLA does not work in isolation; there are a number of groups and associations the FSJPLA collaborates with, including the Friends of the Fort St John Public Library Association, the North East Library Foundation (NELF), the BC Library Cooperative and the Libraries Branch of the Ministry of Education, as well as the British Columbia Library Association (FSJPLA, 2014). Their population of service area is the largest within the NELF and they house the highest inventory of materials, making them a potential model and support structure for smaller libraries within the NELF (K. France, personal communication, 2014).

2.2 Regulatory Governance

The FSJPLA was formed as a Library Association in 1950 under the Public Libraries Act of British Columbia (FSJPLA, 2014a). Subsequent legislative changes now mean the FSJPLA is governed under the Library Act (BC). Part 4 of the Library Act outlines specifics for the regulation of library associations, including membership, board structure, budget matters and general powers and duties (Queen's Printer, 2015). As an association, direction is provided by a Board of Trustees (Board). The Board is comprised of a Chair, Vice Chair, Treasurer, City of Fort St John Representative, Regional District Representatives, Trustees and the Director of Library Services (Director) (FSJPLA, 2014b).

The Library Act is not the only statute that applies to the FSJPLA. The library must adhere to federal and provincial statutes as well as relevant bylaws created by the City of Fort St John. The FSJPLA, like all organizations and individuals in Canada must abide by the Constitution Act, 1982 (Government of Canada, 2015), and the associated Canadian Charter of Rights and Freedoms. The Charter of Rights and Freedoms outlines four freedoms for everyone in Canada (a) freedom of conscience and religion; (b) freedom of thought, belief, opinion and expression, including freedom of the press and other media of communication; (c) freedom of peaceful assembly; and (d) freedom of association (Government of Canada, 2015). These fundamental freedoms form a basis for the content and intellectual aspirations of Canadian libraries as well as a foundation for operations.

The FSJPLA Board of Trustees is defined as a local government body under the Freedom of Information and Protection of Privacy Act (FOIPPA) in BC. Because of this, the FSJPLA has obligations under the Act which is purposed to provide open and legislated rights to access government records and to protect the privacy of individuals from unauthorized collection, use or disclosure by government agencies (British Columbia, 2015). Based on the nature of its business, the FSJPLA is not a typical recipient of Freedom of information requests, but FOIPPA also sets parameters around the collection and disclosure of information which has relevance and impact on the policies and procedures guiding the organization.

The FSJPLA must abide by legislation applicable to having employees. Two primary acts in British Columbia are the Employment Standards Act and the Workers Compensation Act. The Employment Standards Act addresses the hiring of employees, wages and records, hours of work, holidays, leaves and vacations as well as providing mechanisms for complaints and enforcement; (Queen's Printer, 2015) while the Workers Compensation Act outlines when an employee would be compensated and the level of compensation, if they experience workplace trauma along with the employers' and employees' obligations for workplace safety (Queen's Printer, 2015a). The FSJPLA operates in a unionized environment, with all staff that report to the Director being members of the BC GEU. The union agreement further defines the FSJPLA's role and obligations as an employer and the roles and responsibilities of the employee, above and beyond that of current legislation. The agreement is negotiated between the employer and the employees' representatives and outlines detailed items such as grievances, disciplinary action, seniority, job postings, overtime, holidays, leaves, benefits and general working conditions (BC GEU, 2011).

The most recent version of the FSJPLA Policy Manual is from 2009, with an addendum completed in 2010. The 2009 Manual covers a variety of topics, including operations, safety, acquisitions, complaints, gifts, service, membership, fees and fines, internet and computer policies, borrowing, board of trustees, employees and employee development. The manual has not been updated since the current Strategic Plan has been implemented or since the current Directory of Library Services has been in their role. The desire for a new manual has been in place by the FSJPLA for a couple of years and in 2014 the process began.

3.0 Literature Review

Policies and procedures are commonplace in many organizations. They are talked about as essential, yet finding literature on specifics to drafting good policies and procedures relating to libraries was challenging. There are many examples of library specific policies and procedures available but little guidance to support creation and drafting specific to libraries. Because of this, the literature review has focused on developing and writing policies and procedures in general and separately, gathering information around library practices.

3.1 Policies and Procedures Overview

Policies and procedures are the basis for organizational decisions and actions. An organization should use them to aid in coordinating their plans and controlling performance. Good policies and procedures should increase consistency of specific actions by guiding decisions made by many (Randolph, S. 2006 p. 501-502 and Tomey, 2000). An organization stands to benefit from good policies and procedures. Organizations with policies and procedures that are documented have a framework to broach sensitive subjects and reduce the risk of misinterpretation when dealing with staff or clients, often making individuals less defensive. The number of incidence requiring difficult conversations and issue management should be reduced by having quality policies and procedures in place, providing staff or clients a common understanding of key issues making them more likely to align with organization goals and direction (Powers, G. 1982, p. 1132). Policies and procedures will ensure consistency within an organization, they will provide assurances that the organization has clear operational direction and they will improve training and orientation for new staff and patrons.

A policy is the “what and why” of an organization and the procedure is the “how” (Campbell, 1998, p. 2-3). Policies should state the rule, but not how to implement it; they are the organization’s position on an issue (Randolph, S. 2006, p. 502). As a type of position statement, organizational action should be guided by policies (Campbell, 1998, p.1). Good procedures create a document that will establish quality control by describing in adequate detail the step-by-step manner of how the policies will be implemented (Fitsimmons, 2012, p.14). Procedures are action oriented and outline the steps that one can expect to take and the sequence in which those steps should be performed (Campbell, 1998. p.3). Fitsimmons (2012) indicates that one should consider a possible procedure for all policies; it may not be a perfect one to one correspondence. Some policies may have more than one procedure and others will have none (p.15). Policies and procedures can be combined or they can be created as separate documents, depending on the length, how they will be used and what is logical for the organization and user.

Policies and procedures can be written and laid out in a number of formats, depending on the type of organization using them and their intended audience. A “handbook” is usually used for general employee distribution whereas a “manual” provides more detail than just the policies and procedures, it includes detailed instructions on how to interpret, implement and enforce them. Manuals are usually created for a very specific user group and often based off of the more general handbook. Some companies have found themselves with legal troubles because of policies and procedures and have instead implemented “users’ guides” which contain guidelines but not absolutes. This methodology reduces risk if a policy or procedure creates an unintended consequence or if they are not being kept up to date and may not always be correct or relevant (Campbell, 1998, p.65).

3.2 Choosing Policy and Procedure Topics

An organization does not have endless resources to write, maintain or read policies or procedures, nor do they require having an endless amount of policies and procedures. There is a balance that must be achieved so that essential topics are covered, but the amount isn’t overwhelming to read or maintain, or

that there are so few essential the topics are not covered. When determining which policies and procedures are needed, the drafter should consider the subject matter, organizational practices and need. If the topics being contemplated are lengthy, complex, routine but essential, affect employee function, affect the readers' personally or involve a high volume of change then a policy or procedure should be considered for development (Campbell, 1998, p.8). Not every topic needs to become a policy or procedure. It may be preferred to leave policy and procedures unwritten if they involve culture or norms, for example, socializing or dress code, if they cannot be consistently enforced, or if they may be viewed as offensive or intrusive (Campbell, 1998, p.8). If there is an issue that is important or could benefit from documented clarification and the clarification would result in a substantial improved impact on the audience or organization than a policy or procedure should be deliberated. Important issues tend to have an influence over: efficiency, resources, schedules, customers, finances, image or reputation, health and safety, productivity, marketing, staffing, liability and legalities (Campbell, 1998 p.7). When creating policies and procedures the drafter must consider who the audience for each potential topic is. Are they the "user", the individuals that will use and implement? Or are they "readers", the individuals that will utilize them for general awareness and knowledge? The topics should be chosen for the user group (Campbell, 1998 p. 32).

3.3 Making Policy and Procedures Effective

There are two considerations for policy and procedures that were consistently highlighted during the literature review. The first was that the policy or procedures must be in-line with the organizational direction and goals. The second is that the policy and/or procedure must be clearly written.

3.3.1 Organizational Alignment

Emphasis must be placed on aligning policies and procedure topics and content with organizational strategy and operational direction. Policies, purposes and organizational action along with their interdependence with strategy are crucial to the organization, providing its identity and mobilizing its strengths to create success (Andrews, 1998, p. 47-48). Andrews (1998) provides a graphic (Figure 3) linking, formulation, implementation and corporate strategy. Although Andrews' linkages are primarily focused on for-profit businesses, the FSJPLA has many aspects that relate, such as the need to raise funds, provide assurances to stakeholders of a well-run organization and budget management. Having organizational processes and behaviour link to the strategy that is developed and set by the FSJPLA Board of Trustees will provide essential linkages to implementing strategic direction and even formulating a new strategic plan in the future (Andrews, 1998, p. 50). During policy and procedure formulation, the drafter should ensure that the proposed topics and subject matter contained within the documents is consistent with the goals of the organization and their scope of service (Randolph, 2006, p. 501, Tomey 2000). Because the policies are the "what and why" of the organization, they should be developed first, or in tandem with the procedures, the "how" to ensure that they fit well together and align with the organizational goals (Fitsimmons, 2012, p.96). It is imperative that the policies and procedures are kept up to date to represent current standards and organizational practices (Randolph, 2006, p. 502) to ensure they continually support the strategic direction of the organization. As important as alignment to organizational goals, policy and procedures should help mitigate key strategic and operational risks. Establishing policies and procedures creates a baseline that can be used to evaluate organizational and individual(s) performance. The baseline becomes an integral part of an organization's control environment.

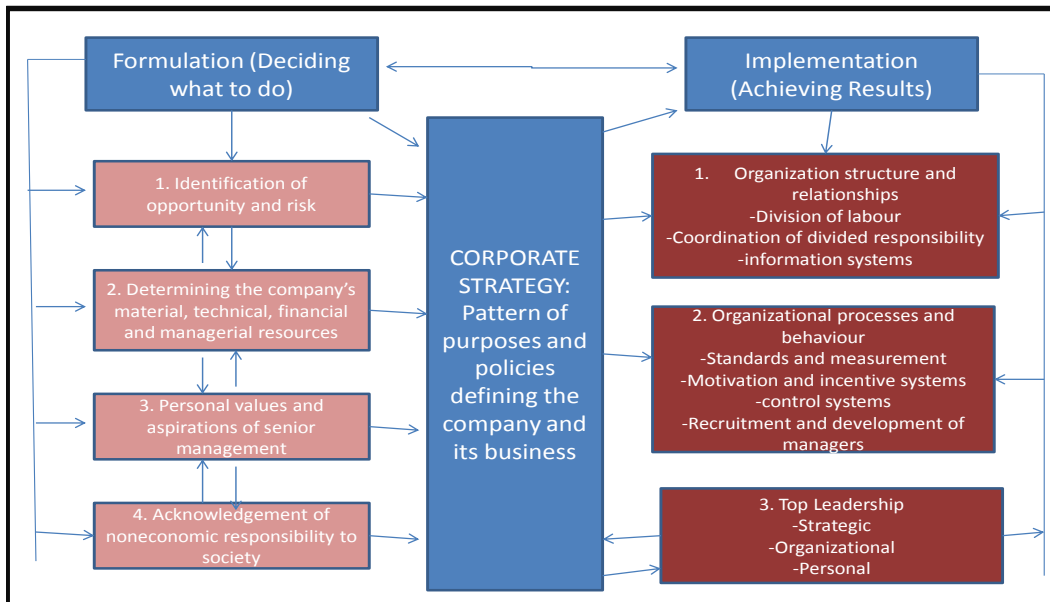


Figure 3: Linkages between corporate strategy and the pattern of purposes and policies that define the company (Andrews, 1998).

3.3.2 Preparing to Write Good Policies and Procedures

Many policies and procedures are short and appear uncomplicated; however, writing them takes significant thought and work. Campbell (1998) outlines four steps to policy and procedure development: planning, analysis, research and prewriting (p. 26). Even if project timelines are ambitious, it is imperative to spend some time in each of the four steps. To have well written policies and procedures, a solid decision making process must first be established to set the topics and begin to frame the content. Once decisions around the scope of policies are made, writing can begin (Campbell, 1998, p.2). The planning stage of policy writing is when fundamental questions should be raised, often in a broad forum, allowing the drafter to get information from those with a wide range of experience and knowledge. The planning stage is also when library staff can provide valuable insight into organizational needs (Osburn, 1979, p. 2). Capturing the existing knowledge of staff and others with varied experiences will allow the drafter to identify problem areas, and engender an organizational commitment to the project along with a common understanding of goals (Osburn, 1979, p.8).

The extent of planning will depend on the number of individuals involved in the project and the level of complexity. Planning should determine who needs to be involved in a project, how big the team should be, along with the team members' assignments. During the analysis the drafter will review what the project is and why it needs to be completed, including why it was identified by the individual person or group. The drafter must determine who the audience for the policies and procedures are, under what conditions they will be used, how urgent the subject matter is and its impact on the identified user group. The research step is the first real action step on matters of policy and procedure content. The scope of research will depend on the outcome of the planning and analysis stages. The drafter should embark on difficult areas first, to allow enough time to study and decipher the findings. Content experts will provide valuable information during the research phase. Research involving human subjects can be conducted by interviews or in writing, such as a memo or email. Soliciting information in writing can have a lower response rate than interviews and the answers may not be as fulsome. Getting information in writing provides documentation which can assist with comprehension at a further date and allows the

subject matter expert sufficient opportunity to understand the questions document their thoughts. During the research phase the drafter should explore books, articles or trade publications, utilize existing organizational information, review suggestion forms or comments that are made and review current policies and procedures. Prewriting is the step that links preparatory work with the actual policy and procedure drafting. If done properly, this step will organize material expediting the speed of document drafting. This stage involves focusing on ensuring a complete content set, organization and a logical flow, not on wording or format. Prewriting can include a mind mapping stage, where thoughts and knowledge are recorded, often at random. The drafter will utilize the pre-writing stage to become familiar with statute and case law relating to the organization of interest and current policy and procedure practices (Campbell, 1998, p. 26-59).

3.3.3 Writing Good Policies and Procedures

Upon completion of the preparation stage, the drafter can begin writing policies and procedures. Policies and procedures can take on a number of formats and appearances, depending on the organization and the user group or individuals they are designed for. Users are expected to practice sound judgment within the limits of the policy and procedure as every variable cannot be accounted for. Proper writing will provide the users with adequate support (Campbell, 1998, p. 5). The writing style and detail will depend on the degree of ambiguity the drafter has determined is acceptable. The level of ambiguity will be determined during the research phase and is based on the users' ability to understand and cope with the specific policy and procedure, the managers' ability and willingness to enforce and the intensity of the issue and how strong the desire to control it is (Campbell, 1998, p. 2-3). Where consistency is the desired outcome, the policy and procedure must include enough information so that working styles will be stabilized and the same quality of work will be achieved regardless of who is performing the specific function (Fitsimmons, 2012, p. 14).

Every policy and procedure will have a level of ambiguity requiring the user to exercise judgment. The framework for the policy and procedures should be consistent, creating documents that are easy to review and understand. Components of each policy should include: a title, category or type (for example HR, IT, Safety etc.), a numbering system, approval date, date last modified, review time frame, an introduction or statement of purpose, definitions, a policy statement, relevant procedures and linkages to other policies and procedures (Randolph, 2006, p. 503).

Policies and procedures do not use traditional writing styles. It is best to remove complicated pompous language and unnecessary verbiage. The users want to be able to get the information they require quickly and they want the information to be clear. Because of this, policy and procedure writing is technical and final documents are often not designed to impress, but to get key messages and steps across in a quick clear fashion (Campbell, 1998, p. 82-84). Unless a policy or procedure is designed to address users that are highly skilled, they should be drafted at a reading level that is reasonable, usually grade 6-8. To do this, the drafter must make sentences shorter and use simple words. The documents should be created for the least experienced member of their audience, therefore jargon and acronym use should be limited and easy to understand (Campbell, 1998, p. 94-95).

The flow of policies and procedures must be logical to the user. The documents should be designed sequentially so that they are in the order in which the user will require the information, particularly with respect to procedures. One step in a procedure that is out of order can have vast consequences for the organization and the user (Campbell, 1998, p.40). The drafter should utilize a good balance of white space, allowing the reader to believe they can get through the document quickly and easily. At the same time, the drafter must be cognizant that white space will make documents longer and if over utilized make items appear unrelated (Campbell, 1998, p 216-217). Well written policies will ensure that they are utilized and understood, maximizing their benefit to the user and the organization.

3.4 Reviewing Policies and Procedures

Policies and procedures require review when they are drafted and when they are in the final stage being decision with the intent of approval. Once implemented, the documents will require reviews on a regular basis to ensure they continue to meet organizational needs. Both of these reviews can follow the same process. A formal policy and procedure for the review and approval of policies and procedures should be created so that cycles and time frames are defined and the clearance review levels are known. Forms and templates can assist with the expediency of these processes. For lengthy documents requiring approval or decision a summary memo should be created. This memo could include items such as the impact of the policy or procedure (positive and negative), the ramifications of implementing, and ramifications of not implementing, as well as consequences of removing from the line up or modifying, the rationale for the request and the internal and external side effects, such as resistance or controversy (Campbell, 1998, p. 275).

There are five steps to a review of policies and procedures.

- 1) Verification: The information must be checked to make sure that it is correct and up to date. For procedures, a content expert should do a review and follow step by step. There are two types of errors to be cognizant of. The first being user error when the wording or format is altered and the second is the policy or procedure content.
- 2) Validation: Policies can be difficult to validate because of the ambiguous nature and statements that are hard to measure, but by providing the documents to several people for honest feedback the drafter will be able to discern if the concept is understandable. Procedures should be checked to ensure that the step by step process is understandable and doable. Actual testing and walk-through of the procedures is required. The drafter should look for user hesitation, places where guesswork is required or times when the user will re-read areas, page flip or improvise.
- 3) Editing: Editing is the step in which the drafter will refine the style and tone. It can be a challenge to improve the format, flow, cohesion and visual appeal without changing the meaning of the policy or procedure.
- 4) Proofreading. A user will be quick to discredit a document that contains typos, punctuation, spacing and title errors, misplaced words, phrases, names and numbers. If practical, proofing should be done by someone independent of the drafting.
- 5) Approval: Each policy or procedure should state the desired approvers. The drafter should be in continual communication with the approvers instead of waiting until final clearance is requested to make sure that the policies and procedures are aligned with organizational needs without significant redrafting (Campbell, 1998, p. 264-273).

3.5 Getting Users to Be Excited About Policies and Procedures

The environment that libraries are working in is constantly changing and providing the FSJPLA a model framework and foundation of policies will provide the basis to meet their strategic goals and allow them to be seen as a leader for smaller libraries and library associations throughout BC. An updated policy and procedure manual will provide direction to the Board, staff, donors and patrons about what the expectations and practices of the library are. But how can the library make sure they are read and followed once countless hours have been spent creating them?

For a policy and procedure to get read, the potential users must be notified that the documents have been created or updated. The organization needs to consider their audience and sensitivity of materials to determine how best to notify users of policy creation and updates. Written format is effective in the

sense that it is uniform to all users, it provides legal documentation and it reinforces key messages. Written is easiest when the users are widely dispersed. The drawbacks of written notification are that it eliminates personal contact and the ability to have an immediate dialogue to clarify questions. Notification in person requires a meeting or meetings with the users to go over the change or creation of policy and procedures. If a policy is ambiguous and needs explanation or there is a sense of urgency, in person meetings are beneficial. Email provides a hybrid notification system. Users can quickly ask questions and have a running dialogue of the new or updated procedures and policies but the rollout is provided in a written form (Campbell, 1998, p. 297-301).

To be effective, policies must be kept up to date. To do this a review process must be defined and implemented. The process should determine if no change is required, minor revisions are required, major revisions are required or if the policy or procedure should be deleted (Randolph, 2006, p. 504). The review should include all statements and their content and references, along with a double check that links remain accurate. The organization should have a system for policy and procedure review as well as defined responsibilities and accountabilities placed in individual staff performance reviews. This system could be something as basic as a spreadsheet that includes title, the number, date approved, date last modified and the "status" (e.g. due for an update, out for review, overdue, update in progress) (Randolph, 2006, p. 503). A filing system is important so that previous copies, as well as comments and history are maintained and archived. When determining if a policy or procedure requires some level of change the reviewer should keep in mind that the problem may not be the content of the policy or procedure, but how it is being implemented or used. When a document is revised, clear wording should indicate what the revision is. Words such as "added, repealed, replaced, rescinded, supplemented, modified, deleted, changed or canceled" are helpful (Campbell, 1998, p. 351). Linkages to other policies or procedures must be considered and acted on during review processes (Campbell, 1998, p. 352).

Policies and procedures must become part of the organizational culture. Policies and procedures will only be effective if they are accurately understood and all of those involved appreciate them, stressing the importance of good utility (Powers, 1982, p. 1132). If supervisors encourage staff to consult the policy and procedure manuals then eventually it will become routine to check the manual prior to asking a question (Powers, 1982, p. 1132). In the case of policies and procedures directed at an external audience, as much as possible the organization should direct users to the documents when questions are asked.

3.6 Fort St John Public Library Roles and Responsibilities

Policy and procedures can help define the roles and responsibilities for libraries, their associations and boards. Libraries in Canada provide a forum for intellectual freedom, relaxation, resource needs, and programs for all ages, along with access to computers and the internet. In 2010, there were 360 million visits made to various types of libraries across Canada, with 69 million electronic database sessions. 590 million publications were borrowed for off-site use or consulted by library users and libraries owned or leased 478 million publications (Schrader and Brundin, 2012). The significance of libraries in Canada cannot be lost, and the Canadian Library Association (CLA) strives to guide libraries and provide support to ensuring they continue to be relevant in changing times and that they have guiding principles to follow. The CLA, founded in 1946, strives to be the national voice for Canadian library communities. The array of principles outlined in the CLA Position Statements creates a vision of libraries that is well beyond four walls and shelves stocked full of books. Statements related to collection development, human resources management, incarcerated persons' right to read, learn and access information, code of ethics, privacy rights, services for people with disabilities, copyright and literacy action are examples of their guiding documents (Canadian Library Association [CLA], 2015b). The CLA stresses the importance of privacy and freedom of expression within libraries, which can require them to take a stance on acts or

processes that are perceived to be against this, including actions as significant as indicating disagreement with the Canadian Government (CLA, 2015b).

The FSJPLA has adopted CLA principles and is a supporter and is supported by the association. The CLA values intellectual freedom, diversity, transparency and open communication, accountability, and universal access to library service and as such works closely with participating libraries to achieve their mission. Because the CLA is viewed as pinnacle force to regional libraries the FSJPLA has adopted the principles they have set out. The CLA has a number of position statements that outline the values that libraries in Canada strive to achieve. These statements cover a number of topics spanning from diversity and inclusion, intellectual freedom, to corporate sponsorship (CLA, 2015). The CLA is progressive, updating their statements as needed, addressing new issues as they arise and implementing change when desired. A demonstration of the CLA remaining current with issues of focus to Canadians is the Statement on Public Access to the Internet, issued in February 2015, which included a statement around terrorism and the reported linkages to library computers which it “wholeheartedly refutes” (CLA, 2015a).

In BC it is the BC Library Association (BCLA) that “leads the library community in advocacy, professional development and support of intellectual freedom, while ensuring that all British Columbians have equitable access to information, ideas and works of the imagination” (BC Library Association, 2015). To promote the library community and provide an advocacy role for libraries in BC, the BCLA conducts many types of activities, including media campaigns, position papers and conducting research (BCLA, 2015a). The FSJPLA is an active member of the BCLA.

While the CLA and the BCLA provide advocacy roles and support to the libraries, organizations such as the North East Library Federation (NELF) are working at the strategic and operational level to make libraries in northern BC a focal point in creating strong communities. NELF is funded primarily by the provincial government and serves the northeast region of BC, capturing the communities of Chetwynd, Fort Nelson, Fort St John, Taylor, Hudson’s Hope, Pouce Coupe, Tumbler Ridge and their surrounding areas (NELF, 2013, p.3). The FSJPLA is an active member of NELF and is the largest library within the organization which is striving to help optimize databases, coordinate regional programming, increase consortium purchases, share ideas and information and improve on staff training needs (NELF, 2013, p. 9-11)

The FSJPLA practices the principles and roles of the CLA and BCLA, while participating in NELF. The advocacy, freedom of expression and access to information role of the library is, or will be, reinforced in the strategic planning processes, the protocols it has with its patrons and members, and the materials it provides within its policy and procedure framework.

4.0 Methodology

This 598 Project primarily took a qualitative analysis approach. When the researcher first contacted the FSJPLA, she did not have experience working with libraries or not for profit associations, although the researcher does have a fair bit of experience working with legislation and policy. The first task the researcher undertook was to learn about libraries and what issues they have faced in the past, the status of libraries today and the outlook for libraries in the future. Along the same timeline, the researcher also learned about the FSJPLA, its current structure, operations, issues it faces, and its future needs. The 2009 Manual was reviewed for content and themes. Throughout the process conversations were had and questions discussed with the Director of Library Services.

A literature review was completed, with a focus on writing effective policy and procedures and a sub focuses on libraries and their operating environment and how the FSJPLA fits into the framework it operates in. The literature review comprised an initial search of Google Scholar utilizing key words. The

University of Victoria's online library portal was also searched for relevant articles and entries. Three books were reviewed in detail, Stephen B. Page's "Establishing a System of Policies and Procedures" (2005), Nancy Campbell's "Writing Effective Policies and Procedures" (1998) and Catherine F. Smith's "Writing Public Policy" (2005).

The researcher then did an initial review of eleven of libraries to determine what policies and procedures they had publicly available as well as a review of the 2009 Manual. An analysis was completed to determine which policies and procedures were standard, which ones were "nice to have" and which ones were potentially missing from the library scan. The libraries analyzed consisted of library associations, large city libraries, regional libraries, university libraries and small town libraries, providing a cross section of sources. Primarily libraries in Canada were the focus, as libraries outside of Canada are developed under a different legal framework and tend to have different strategies and purpose. The CLA and BCLA websites were also reviewed as they provide benchmarks for policy statements and current practices.

Upon observation that many libraries had very similar policies and procedures, likely building off one another's, the researcher identified a need to review more than libraries' policies and therefore reviewed policies from a number of sources, including universities, cities and towns, government agencies, and other not for profits, such as the Salvation Army. Taking note of styles, formats, templates and themes, the researcher was able to brainstorm a number of topics or subjects that may be of interest to the FSJPLA, as well as rule out a number of topics that were irrelevant to the FSJPLA.

Once it was determined what policies and procedures were common practice and what appeared to be undeveloped or under-focused for libraries, the researcher made a list of potential policies and procedures, with recommendations, which were reviewed by the Director of Library Services for decision. Once the final list was selected, the researcher began gathering information about what substance was currently available from other organizations as well as the existing FSJPLA manual for the decided topics and what needed to be written. It was agreed that there would be a focus on external policies as the need was greatest and the researcher was not located in Fort St John, so working remotely. The Director provided the researcher with insight into why some policies or procedures were on the forefront and the importance of having them in the documentation.

The researcher's ethics application included the option for surveys to be conducted with staff and others that would have specific policy information. It was determined that the Director of Library Services, along with a final review from the FSJPLA Board of Trustees would adequately represent the FSJPLA staff for the purposes of this project. The FSJPLA has a small staff contingent in which the Director is in regular communication with so asking repetitive questions may have created a burden on FSJPLA resources.

The researcher followed Campbell's four step process. Because of the unfamiliarity with libraries and the policies that guide them, the research phase was ongoing throughout, constantly receiving new information and improving formats, content and technique for drafting. The prewriting and analysis stages were also blended with the steps undefined. Much prewriting occurred in the form of brainstorming on subject matter, and then the matter was analyzed, more brainstorming occurred, and re-analyzed again. After the brainstorming, drafting of the policies and procedures began and iterations were reviewed and commented on by the FSJPLA Director, until the final draft manual was presented to the Board for feedback.

5.0 Results and Discussion

5.1 Policies and Procedures for Libraries

British Columbia's first library opened in 1891 and since then BC has 245 library service points for its citizens. Libraries have become much more than a source of books or a quiet place to read. Most libraries offer Internet and Wi-Fi use, programs such as reading clubs and mother goose, public computers and digital materials and magazines (BC Government, 2015a). The Fort St John Library is no different; with limited resources it is striving to keep up with a rapidly changing landscape, while still maintaining the services that its patrons continue to expect.

In a time when expectations of libraries and the service they provide are changing, the environment in which the FSJPLA operates in is also changing. Libraries have become increasingly digital, with less emphasis on hard copy books and increasing focus on digital materials, along with experiencing the increased use of publicly available library computers and Wi-Fi. Some library patrons and members will visit the library's website prior to a visit to the library, while others will only visit the website as they are able to get sufficient information from the digital resources while staying in the comfort of their home or office. Examples like this demonstrate the constant state of change the FSJPLA experiences, requiring them to have a Board with forward thinking ideas and progressive employees, ones that are able to think innovatively and accept change, while still embracing what is happening today. The implementation of change can be vastly improved by having a framework in which rules and processes can be documented, particularly for staff and patrons that are not comfortable with new practices. For the FSJPLA, the rules and practices are documented in the form of their 2015 Policy and Procedure Manual (2015 Manual). The manual documents existing practices and creates a forum to document new rules and process that are being brought in to reflect the current state as well as account for future changes.

Fluctuating funding sources for the FSJPLA can place a consistent strain on those operating the library. 51% of the library's funding has typically been provided by the City of Fort St John. The City relies on the Fair Share Agreement between themselves and the province for funding, as many of those that utilize the City's resources do not live in or pay taxes to the City. The Fair Share Agreement is the subject of negotiations with the province, creating a financial uncertainty for both the City and the FSJPLA (Kurjata, 2015). The oil and gas sector in the Fort St John area is known for providing sizeable contributions to non-profit organizations such as the FSJPLA. With the low price of oil and gas and other market uncertainties, the industry may not be as generous during economic slowdowns such as the one currently taking place. With fluctuations in library funding, the library must ensure that its resources are efficiently utilized to maintain its core business and keep its small team of essential staff employed. In order to meet its Strategic Plan and the measures outlined in it, having a firm set of policies and procedures will create desired consistencies and efficiencies. When staff, clients and sponsors have well defined parameters to work within, time will be saved dealing with fewer discrepancies, and creating a more consistent operating environment. FSJPLA has a small workforce and the 2009 Manual has never received a wholesale update. This highlights the importance of creating policies that are functional but also can easily be modified or updated. Without keeping them up to date, patrons, staff and donors will not utilize them or they will be applied inconsistently or incorrectly. The consequences of not utilizing policies can range from minimal annoyances to the extremes where there could be a lawsuit or harmful accident because proper protocols were not adhered to or an individual has gone against direction outlined in a policy or procedure.

5.2 Understanding the FSJPLA in relation to Libraries in Canada

The first stage in this project was to determine what policies and procedures were common amongst other libraries. Libraries in Canada tend to adopt the policy statements from the CLA. The CLA provides a voice for its member libraries and strives to champion library values and the value of libraries, have influence over public policy that impacts libraries, strengthen the library community through collaboration and inspire and support member learning (CLA, 2015c). The researcher took a random sample of libraries in Canada and as well the Seattle Public Library and made a list of policies and procedures that were common amongst them along with outliers that may be of interest to the FSJPLA. The comparison is outlined in Table 1: A summary of Policy and Procedure Topics in North American Libraries.

Table 1: A summary of Policy and Procedure Topics in North American Libraries

Topic	Libraries	Comments
Accessibility for Persons with Disabilities	-Toronto Public Library -Vancouver Public Library -Innisfil Public Library	-CLA has a position statement regarding this
Access to Information & Protection of Privacy	-Toronto Public Library -Innisfil Public Library -Smithers Public Library -Chetwynd Public Library -West Vancouver Memorial	
Advertising Policy	-Toronto Public Library -Innisfil Public Library	
Children’s Internet Use Policy	-Toronto Public Library	-Typically rolled into general internet use policies. -Document is created to be fun and easy to read by children
Circulation and Collection Use/Interlibrary Loans	-Toronto Public Library -Greater Victoria Public Library -FSJPLA 2009 Manual	
Display & Distribution of Information to the Public	-Toronto Public Library	
Computer & Internet Use Policy	-Toronto Public Library -Vancouver Public Library -Greater Victoria Public Library -West Vancouver Memorial -Innisfil Public Library -Seattle Public Library -Calgary -Smithers Public Library -FSJPLA 2009 Manual -Fort Nelson Public Library -Chetwynd Public Library	-CLA has a position statement relating to this
Lobbying Disclosure for Board Members	-Toronto Public Library	
Materials Selection	-Toronto Public Library	

Policy/Collection Development	-Vancouver Public Library -Greater Victoria Public Library -West Vancouver Memorial - Innisfil Public Library -Seattle Public Library -Calgary -FSJPLA 2009 Manual	
Online and Social Media Policy	-Toronto Public Library -Vancouver Public Library -Greater Victoria Public Library -Innisfil Public Library	
Online Privacy Access to Information	-Toronto Public Library	
Rules of Conduct	-Toronto Public Library -West Vancouver Memorial -Calgary -Wood Buffalo Regional	-Wood Buffalo policy is now removed, but was available at the time of the scan.
Security Video Surveillance Policy	-Toronto Public Library -FSJPLA 2009 Manual	-FSJPLA Manual discusses security and alarms with direction to staff
Use of Library Space for Art Exhibits Policy	-Toronto Public Library -Innisfil Public Library	-Not of concern to the FSJPLA
Donations Policy/Sponsorship	-Vancouver Public Library -West Vancouver Memorial -Innisfil Public Library -Seattle Public Library -Smithers Public Library -FSJPLA 2009 Manual	
Board Protocols/Governance	-Vancouver Public Library -Greater Victoria Public Library -West Vancouver Memorial -Innisfil Public Library -FSJPLA 2009 Manual	
Others	-Bottled Water in Library -Code of Conduct/Ethics -Community Engagement Values -Customer Service Statement -Electronic Equipment use in the library -Green Housekeeping (Innisfil) -Homebound Service (Innisfil) -Unattended Children (Seattle) -Parental Responsibility (Smithers)	-FSJPLA offers homebound service -FSJPLA has concerns regarding unattended children and parental responsibility in the library
Diversity and Inclusion	-Vancouver Public Library	-CLA has a position statement relating to this topic

Human Rights and Harassment Policy	-Vancouver Public Library	-Similar to policies with different names such as Diversity, Access and Inclusion, and general library conduct
Financial Policies	-Vancouver Public Library -Greater Victoria Public Library -West Vancouver Memorial -FSJPLA 2009 Manual	
Procurement/Purchasing Policy	-Vancouver Public Library -Innisfil Public Library -FSJPLA 2009 Manual	-Procurement and Purchasing are included in Financial Policies or general policies, depending on library
Records Management Policy	-Vancouver Public Library	
Membership/Borrowing/Fees/Fines	-Greater Victoria Public Library -West Vancouver Public Library -Innisfil Public Library -Calgary Public Library -Smithers Public Library -FSJPLA 2009 Manual -Fort Nelson Public Library -Chetwynd Public Library	
Workplace Practices (respect, Violence, health and safety)	-Greater Victoria Public Library -Innisfil Public Library -FSJPLA 2009 Manual -Requesting customers to leave (Halifax)	-Much of this topic is legislated in BC -External and internal policies may be required
CLA Intellectual Freedom Statement	-West Vancouver Memorial -Smithers -FSJPLA 2009 Manual	From CLA and adopted by libraries

Table 1 is not an exhaustive list of all library policies and procedures, it was created to capture a snapshot of libraries and to create an understanding of the themes and concepts covered by the subject libraries. The table was drafted as the planning step identified by Campbell (1998) in policy writing. Some policies topics not commonplace on library websites, but were found elsewhere and ideas stemming from them were incorporated into the 2015 Manual. For example, some of the concepts relating to travel expenses were derived from the thorough policy on the Salvation Army website.

The FSJPLA operates in a small northern city, requiring its 2015 Manual to cover many of the same policy categories as the larger city libraries, but is spared some of the larger city issues, such as managing multiple buildings. It became clear that many of the libraries build off of what others have created, as many of the policies and procedures have a similar look and feel to them. The types and numbers of policies and procedures were not consistent between comparable cities, library associations and co-ops or ones that were geographically close together. The City of Calgary only has five policies posted on its website, while the small city of Innisfil, Ontario (population approximately 33000) (Innisfil Business, 2011) has forty three. The cities of Regina and Saskatoon do not have any policies or procedures readily available on their library websites; however, their websites provide clear guidance on some topics much like a policy or procedure would, suggesting there may be internal documentation that is used as a

reference to create the public facing webpages. Because each library has control over its own policy and procedure documents, taking a count does not provide an accurate description of the documents as one library may choose to include a number of topics under one policy while another may break the topics out into separate policies. The researcher read through policies for over twenty libraries, but chose to focus on the following libraries: Vancouver Public Library, Calgary Public Library, Greater Victoria Public Library, Innisfil Public Library, Smithers Public Library, West Vancouver Memorial Library, Fort Nelson Public Library, Chetwynd Public Library, Wood Buffalo Regional Library and the Okanagan Regional Library, along with the 2009 Manual.

Many libraries have indicated on their websites that they support the CLA position statement on Intellectual Freedom. This statement, first developed in 1974 and amended twice afterwards indicates the libraries' duty to provide Canadians with the right, as defined "...in Canada's Bill of Rights and the Canadian Charter of Rights and Freedoms, to have access to all expressions of knowledge, creativity and intellectual activity and to express those thoughts publicly...." The position statement, as seen below makes the message clear that libraries in Canada are upholding the basis of the Canadian culture in their operations. This position statement, along with the FSJPLA Strategic Plan helped inform the framework in which policy and procedure topics and content were prioritized.

All persons in Canada have the fundamental right, as embodied in the nation's Bill of Rights and the Canadian Charter of Rights and Freedoms, to have access to all expressions of knowledge, creativity and intellectual activity, and to express their thoughts publicly. This right to intellectual freedom, under the law, is essential to the health and development of Canadian society.

Libraries have a basic responsibility for the development and maintenance of intellectual freedom.

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. To this end, libraries shall acquire and make available the widest variety of materials.

It is the responsibility of libraries to guarantee the right of free expression by making available all of the library's public facilities and services to all individuals and groups who need them.

Libraries should resist all efforts to limit the exercise of these responsibilities while recognizing the right of criticism by individuals and groups.

Both employees and employers in libraries have a duty, in addition to their institutional responsibilities, to uphold these principles (CLA, 2015b).

There are many similarities and differences between Canada and other countries, but the basis of the CLA's position statement, along with Canadian culture led to the researcher determining that spending significant time reviewing policy and procedure themes from non-Canadian libraries was fruitless as they did not fulfill the same purpose. Some libraries, such as the Seattle Public Library and the Portland Public Library did have value for specific interests and policy topics. Based on the 2009 Manual and the topic review the researcher made the following list of policies that were considered to be high priority:

- A policy and procedure about Policy and Procedures;
- A Board Member Policy and Procedure;
- Safety Policy and Procedure;

- Library Acquisitions and Disposals Policy;
- Computer and Internet Use Policy;
- FSJPLA Website and Social Media Use;
- Membership, Borrowing and Fees Policy;
- General Operations Policy;
- Accessibility and Inclusion Policy;
- Access to Information and the Protection of Privacy Policy;
- Building acquisitions and contract management (This policy was rolled into the Financial Policy);
- Advertising, sponsorship and donations policy;
- Internal Policy and Procedures for (This policy was not completed as part of the MPA 598 project).

There were a few other potential policy topics presented to the Director for consideration:

- Materials Posting Policy;
- Expenses (Re-titled as the Financial Policy and Procedures);
- Excluded Employee Policy.

The Director confirmed that the high priority list was appropriate. With input from the Director on the other potential topics, it was decided the materials posting policy would be addressed through the General Operations Policy and Procedure, there would be an Expense (Financial) Policy and Procedures drafted and that the Excluded Employee Policy was not required because the offer letter for the Director addresses the required topics and the Director is the only excluded employee on payroll at the FSJPLA.

The researcher excluded items that were already covered by existing legislation, employee related items that were covered by union contract and items covered in the FSJPLA Strategic Plan and other guidance documents. Existing legislation does not need to be covered. Policies should be developed based on existing legislation; for example legislation says that people must not be discriminated against, while the Accessibility and Inclusion Policy and Procedures outlines the actualities to achieve the legislated requirements. Because of examples like this, a legislative review was conducted and is discussed below.

5.3 Analysis of Legislation

Legislative processes are not always front of mind for those working for a library, nor does a typical library user think about legislation while accessing library resources. Some may feel the Canadian Charter of Rights and Freedoms is the foundation in which Canada is based and in many ways the functions of libraries are pivotal in supporting this Charter. Most don't open the door to the library and think "I look forward to seeing how this library is upholding the Canadian Charter of Rights and Freedoms", partially because the mindset created by the Charter is engrained in Canadian culture and partially because libraries are created to do more than reference legislation. Legislation is important in policy and procedure development. It is imperative that the policy and procedures do not violate law or legal precept, either intentionally or unintentionally or that they don't bind the organization's ability to act lawfully (Campbell, 1998, p. 58). The researcher spent time reviewing federal and provincial legislative documents to have an understanding of the framework in which the libraries in BC operate. Legislation in Canada is intertwined and extensive. Rewriting legislation within a policy or procedure could create a risk of misinterpreting the legislation or missing crucial pieces. It also means that the policy or procedure would need to be updated every time relevant portions of the legislation are

updated. Instead, each policy and procedure has a list of “Legislation of Interest”. These lists are not exhaustive because if one chose to dig deeply into legislation many laws would be applicable but would have little relevance to the policy and procedure user. Instead, key pieces of legislation are listed, providing the user hyperlinks to review themselves. In most cases, the policy and procedure users are not anticipated to be referencing the legislation regularly, but the information is provided as a reference. In the case of a serious issue or disagreement that involves legislation, the suggested path for the FSJPLA to move forward is to obtain legal advice.

The fundamental piece of legislation relevant to almost all of the FSJPLA policy and procedures is the British Columbia Library Act. This act enables the delivery of public library service, establishing municipal, regional and library federations along with allowing library associations that were in existence prior to the Library Act, such as the FSJPLA to continue to operate, while supporting improvements to the public library service. Key areas of the Library Act that are of interest to the FSJPLA are Part 4 – Public Library Associations and Part 5 – General. Part 4 highlights how a library association is defined and who its members are, along with board composition and powers. Part 5 has general provisions that direct library operations, such as legally requiring free public service for defined individuals and the ability to enforce library rules and reimburse board members for some expenses (Queen’s Printer, 2015b).

The BC Freedom of Information and Protection of Privacy Act (FOIPPA) is an extensive piece of information that makes public bodies accountable to the public and to protect personal privacy. As a library association in BC, the FSJPLA is required to adhere to this piece of legislation. Based on the typical operations of the FSJPLA, the chance of receiving a FOIPPA request in which they are required to respond is low. Their interaction with the requirements to protect personal privacy is moderate based on their ability and requirement to collect information of its members. FOIPPA can be a complicated piece of legislation and to support the use of it, the Ministry of Technology, Innovation and Citizens’ Services has created a guide to it. The policies and procedures within the new manual have been created to support the library as it relates to FOIPPA (British Columbia, 2015).

Every employer and employee in British Columbia has a suite of legislative requirements placed on them to protect workers and their employers by creating standards and process to follow during normal working operations and then defining processes and requirements should an issue arise. The Workers Compensation Act is related to compensation when there is a workplace incident, but preference is to prevent the need for compensation with the creation of the Occupational Health and Safety Regulation as part of the Workers Compensation Act (Queen’s Printer, 2015a). Other pieces of legislation and policies relating to safety and workplace conditions are the BC Safety Standards Act, and the Canada Workplace Hazardous Materials Information System (WHIMIS). WHIMIS covers a broad spectrum of hazards, some of which library staff may be exposed to, such as printer toner and ink.

The Constitution Act (1982) marked a new beginning for Canada, creating a new political independence and sovereignty from Britain. The 1982 Constitution Act outlines Canada’s government, laws and civil rights, while assuring Canadians’ fundamental rights and freedoms through the Charter of Rights and Freedoms (Government of Canada, 2014). The Charter of Rights and Freedoms outlines fundamental freedoms for all Canadians. Many libraries uphold these freedoms in their selection of materials, access to information for all and welcoming environments, particularly the freedom of conscience and religion and freedom of thought, belief, opinion and expression, including freedom of press and other media of communication (Government of Canada, 2015).

Copyright laws in Canada are extensive, with the leading piece of legislation being the Copyright Act. Copyright “means the sole right to produce or reproduce a work or a substantial part of it in any form”. It provides protection for “literary, artistic, dramatic or musical works (including computer programs)....”

(Canadian Intellectual Property Office, 2015). The FSJPLA can be impacted by copyright laws on a number of fronts, in some cases, unintentionally. Copyright laws apply to FSJPLA staff and patrons and all must be aware of their actions, particularly when printing items off of the internet, reproducing digital works or photocopying materials, but as well when sharing materials. The Canadian Library Association has extensive information specific to libraries on their website which is updated regularly. There is a draft policy included on this website which the FSJPLA could consider in its next update of the 2015 Manual.

In 2014 the Federal Government enacted Canada's Anti-Spam Legislation. This law creates prohibitions relating to the sending of commercial electronic messages without consent, the collection of personal information through accessing computer systems and the collection of electronic information. This legislation is one that the FSJPLA will be required to be cognizant of when working with electronic transactions. The Canadian government has created documentation to assist businesses and organizations in the compliance of this legislation and as such, it was only referenced as legislation of interest in the relevant 2015 policies and procedures and not duplicated within them (Government of Canada, 2015a).

It can be overwhelming to an organization should they believe they must know all laws and regulations thoroughly. The 2015 Manual is created with hyperlinks to the legislation, so that only a general knowledge of what legislation exists and what its main focuses are is required. From here, the user can look up the specific information through the Government of Canada or British Columbia's websites as needed. Providing hyperlinks ensures that the user is always receiving the most up to date version of the legislation, whereas hard copies or portions placed into policies can become stale dated as the legislation and supporting documents is updated.

5.4 Aligning Policies and Procedures with the FSJPLA Organizational Strategy

The British Columbia Library Act (Act) provides the FSJPLA the basis in which it operates. The purposes of the Act are:

- (a) To encourage the extension and use of public library service throughout British Columbia;
- (b) To enable the delivery of public library service in British Columbia by:
 - (i) providing for the establishment and operation of municipal libraries, regional library districts and library federations, and
 - (ii) Allowing existing public library associations and integrated public library systems to continue to operate, and
- (c) To support improvements in public library service.

The Act allows the FSJPLA to be identified as a library in British Columbia and sets parameters around operations, including the composition and function of the library board. Part 4 – Public Library Associations define the composition of the board, the meetings of the board, financial items the board must adhere to and the general powers and duties of the library board (Section 39). It is through these general powers that the library board makes rules for managing the business of the board and for regulating the use of its facilities and services by the public, along with appointing the chief librarian (Director) and raising funds (Queen's Printer, 2015b).

With the powers provided through the Library Act to the FSJPLA Board, the 2012-2015 Strategic Plan was developed and implemented. When drafting the 2015 Manual, the researcher had to consider the FSJPLA Strategic Goals and Initiatives along with the associated performance measures. These are:

- 1) Continue to provide top-notch service to our customers
 - Develop and execute a long-term library space plan
 - Formalize customer surveying and service improvement program
 - Goal: Patron Satisfaction with service delivery
- 2) Deliver programming that meets the needs and diversity of our community
 - Develop a plan to increase programming and services for currently underserved demographics (e.g. seniors, teens, multilingual services)
 - Implement a program delivering an increased number of speakers and workshops on unique topics
 - Identify and leverage opportunities to support and provide services aligned with the BC Education Plan
 - Goal: Program participation and participant satisfaction with programming
- 3) Increase the awareness and usage of the library's services
 - Continue the library rebranding campaign
 - Develop and implement a marketing campaign
 - Refresh the Library's website, with a focus on increased interactivity
 - Goal: library website usage rates and library visits
- 4) Maintain financial stability through good stakeholder relations and a broadened funding base
 - Develop and implement a long-term financial plan
 - Develop and implement a community relations strategy
 - Develop key performance indicators and reporting approach for communication with stakeholders
 - Goal: funding growth
- 5) Support staff in maintaining the skills and capacity to deliver great services and programming
 - Implement a needs-based staff training and development strategy
 - Update technology and ensure staff have the related skills
 - Goal: Staff engagement (FSJPLA, 2012)

Table 2 provides linkages to the FSJPLA Strategic Goal and Performance Measures and a brief rationale for how the policy or procedure will support the Strategic Measure.

Table 2: Alignment of Policy and Procedure Topics with FSJPLA Strategic Goal & Performance

Strategic Goal & Performance Measure	Associated Policies and Procedures	Rationale
1) Continue to provide top-notch service to our customers	<ul style="list-style-type: none"> • Board of Trustees • Membership, Borrowing and Fees • General Operations • Computer and Internet Use • Social Media and FSJ Public Library • Accessibility and Inclusion • Material Acquisitions and Disposal • Financial 	-policies overall help improve customer service as they provide a known platform for service and create a stable operating environment with consistent practices. The policies and procedures mentioned range from providing board and staff direction to demonstrating

	<ul style="list-style-type: none"> • Sponsorship and Fundraising 	<p>to patrons how they can become members and utilize FSJPLA resources.</p> <p>-Part of providing top-notch service is ensuring that financial responsibilities are transparent and adhered to and as well having adequate funding provided by sponsorships and fundraising.</p>
2) Deliver programming that meets the needs and diversity of our community	<ul style="list-style-type: none"> • Materials Acquisitions and Disposal • Accessibility and Inclusion • Membership, borrowing and Fees 	<p>-FSJPLA strives to provide materials that meet FSJPLA patrons' unique needs and the policies created supports this.</p> <p>-Ensuring all can access the library or have access to library resources means that there will not be members in the community that are isolated based on physical, mental, racial or religious beliefs.</p> <p>-FSJPLA demonstrates through their membership and borrowing policies that there are flexibility options to ensure no individual is without access to library resources. This includes providing services such as mini-memberships.</p>
3) Increase the awareness of the library's services		<p>-There is not a policy or procedure that is clearly linked to this performance measure. However having a policy manual allows users to review what services the library provides and how they are implemented.</p>
4) Maintain financial stability through good stakeholder relations and a broader funding base	<ul style="list-style-type: none"> • Sponsorship and Fundraising • Financial 	<p>-The policies demonstrate to stakeholders that the FSJPLA is a well-run organization that provides</p>

		exemplary service to its patrons while respecting donations and budgeting appropriately.
5) Support staff in maintain the skills and capacity to deliver great services and programming	<ul style="list-style-type: none"> All policies 	-When staff have a set criteria of expectations to base their work from then they will be able to determine what the needs are for staff training and development

5.5 Policy and Procedure Content

The policies and procedure manual is not meant to be a static document and it is anticipated that the policies and procedures captured within it will continually improve as they get implemented and utilized. Planning for the FSJPLA manual took considerable time. As already discussed, a list of potential policy and procedure topics was created. During the creation of this list, the researcher was trying to determine what topics many libraries are likely to have, along with what topics could be specific to the FSJPLA, what topics libraries do not appear to have but should consider and equally as important, what topics should not be covered for the FSJPLA. Developing the list of policy and procedure topics was the first step, followed but subcategories and criteria for what should be captured in them. When drafting policies and procedures, the potential span of topics can be varied and can be infinite. Because policy and procedure documents need to be user friendly and enticing to read, along with being easy to maintain and update, it was important to get feedback from the FSJPLA on what issues or concerns tend to arise consistently or that they anticipate could arise in the future. The brainstorming was conducted primarily between the Director and the researcher. The varied backgrounds between the researcher and the Director meant that the FSJPLA has ended up with policy coverage that is focused on library specific issues as well as others that span many organizations.

With a brainstorm of policy and procedure categories, subthemes within those categories and examples from other agencies (if existent), analysis began. The researcher placed considerable focus on trying to determine if a policy or procedure would be effective for the library, if it made sense specifically for the FSJPLA and if there was a way to consider it in a way that would not be time limited. For example, instead of referencing “DVDs” which may not always be used in the future, reference “digital materials” to limit unnecessary updating. During the brainstorm the researcher asked many questions and the FSJPLA will need to continually ask similar questions when determining whether or not to create a new policy or procedure, whether to modify an existing one, or whether or not to delete one they have:

- Is the topic of conversation one that tends to come up repeatedly and there is not clear direction around it?
- Is this topic one that creates tension between individuals or groups?
- Is this topic one that new staff and board trustees would not naturally know and could therefore benefit from reviewing a policy or procedure?
- Is there one or two staff members that know and understand this topic well, while others do not, leaving the organization at risk if they depart?

- Is this topic one that would provide library supporters with confidence that they are supporting a well-run, community focused organization?
- Is this topic an issue that is anticipated to continue into the future?

If the answer to one or more of these questions is yes, then the topic should be kept during the planning and analysis stage. If the answer to all of these questions is no, then the researcher and future drafters have to consider modifying the topic, or deleting it entirely. Prior to modifying or deleting, consideration was given to why it was a topic in the first place and why it does or does not need to be considered now. For example, the 2009 Manual included job descriptions for FSJPLA staff. Job descriptions were not presented in any other external facing policy and procedure documents. Instead, the researcher held onto the idea that the FSJPLA had a desire to maintain job descriptions and keep them updated, but they did not necessarily need to be placed in the 2015 Manual. Therefore, the requirement to update and maintain job descriptions was made a topic in the 2015 Manual, but it does not include the detailed job descriptions.

5.6 Analysis of FSJPLA 2009 Policy Manual

Scanning the FSJPLA 2009 Manual provides a quick glance into understanding the need for a new set of policies and procedures. The 2009 Manual attempts to cover a number of topics briefly and in doing so leaves room for error and confusion. A thorough review of the 2009 FSJPLA Manual was conducted. This manual serves its purpose and provides crucial information. The 2009 Manual has content that is stale and does not meet some of the recommended practices for policy and procedure writing. It does not have the policy and procedures broken down in a logical format, and it does not have a consistent feel or presentation, making it clunky and unappealing to read. The 2009 Manual is old, leaving some content out of date. This out of date content makes it difficult for the reader to know what parts of the manual are correct and what parts are in need of replacement. An out of date manual deters the reader from referring to it. There is a risk with an out of date manual that it does not get used and an important policy or procedure was not followed resulting in some type of infraction or issue, or that the manual is used and what is indicated is inaccurate, creating an action or process that fails to meet the current needs of the library today.

The 2009 Manual covers topics that were carried forward into the 2015 Manual; much of the topic substance underwent significant change either in content or reformatting. In some cases the wording or phrases were kept intact, while in other cases, the topic or intention was kept the same while a rewriting of the format and content was completed. This was to allow for the writing style to fit into the new template and to bring the topic into alignment with the current FSJPLA Strategic Plan and organizational direction. The 2009 Manual covers policies such as safety, policy review, acquisitions, public complaints, membership, fines and fees, borrowing privileges, computer and internet policies, security, inter-library loans and reservations, the Board/Governance, staffing (including recruitment), medical coverage, professional development, job descriptions, and purchasing. In general, the 2009 Manual covered many essential topics, but most were skimmed over without enough depth to create clarity on the subject matter.

There were some topics in the 2009 Manual that were purposely removed from the 2015 Manual. The 2015 Manual does not cover specific direction to employees that should be placed in an internal manual, such as password use and the locking of computers and file drawers. It also does not address the use of the security system, again because this is best placed in the internal manual. Information relating to specific Board committees was dropped as their objectives can be set by each committee and change over time. Information relating to staffing was removed as a specific policy. Given that the FSJPLA operates in a unionized environment, the majority of staffing items will be addressed through

the BCGEU collective agreement. What is not addressed through the collective agreement should be placed in an internal manual. As previously explained, job descriptions do not belong in the 2015 Manual. A statement regarding keeping job descriptions up to date was placed in the manual to ensure they are on hand and have utility. In the 2009 Manual Appendix the CLA Statement on Intellectual Freedom is placed. Instead of including such statements in the 2015 Manual, hyperlinks are provided to relevant CLA Statements. This ensures that the readers are not reviewing old versions of items such as policy statements when following the 2015 Manual.

5.7 The 2015 FSJPLA Policy and Procedures Manual

A template has been created in order to allow all of the policy and procedure documents to follow consistent format. The template is designed so that each policy and procedure can be a standalone document, allowing for easy review and update. This also provides the FSJPLA with the flexibility of taking policies and procedures and posting them, either digitally or physically in the building as well as the ability to update smaller portions. The 2015 Manual was created so that there was a repository for all of the documents combined. Because of the standalone format of each policy and procedures, there is repetitive wording in the 2015 Manual. In order to maintain a consistent feel each policy and procedure has the same categories, with a variety of subheadings based on the topic. There is no defined length for a policy and procedure. The intent is to keep it brief but clear, two to three pages is ideal. For topics requiring a lot of detail, such as the Board of Trustees Policy and Procedures more length was required. This is linear to the level of responsibility the Board holds. As the prime advisors for the FSJPLA, they require a policy and procedures with sufficient information to ensure their time is spent overseeing the library and not wasted on trivial process or items that can be addressed in a policy or procedure.

The 2015 Manual, as seen in Appendix A, includes citations as it was drafted to fulfill a course requirement. It is not expected that the FSJPLA will maintain the citations in the final version presented to the Board or posted, as this is not the norm amongst libraries or other public facing policy documents. Having the citations does provide the FSJPLA with the ability to reference what other libraries are currently stating on certain policies and procedures which can assist them with remaining consistent and up to date across Canada. The policy and procedure template included in Appendix B is designed to provide an order in which the drafter can work through the sections and create a consistent presentation for FSJPLA policy and procedures. The first section is "Purpose and Statements". The drafter must clearly define what the purpose of the document is and what FSJPLA's position statements are relating to the topic. If a purpose or statements cannot be drafted, then the drafter should rethink the intent of the policy and procedure as they may not have a clear enough understanding of its goals or why it is required for the FSJPLA. Following this is the "Application". Policies and Procedures may not apply to everyone, so the drafter must define who the target user for the document is and then who has the ability to change it under the "Authority" category. Once the drafter has gone through these steps, they have confirmed that they understand the intent and purpose of the document they are writing. Following this, they must do a legislative review to ensure they understand what is already required by law. The key pieces of legislation will be listed under "Legislation of Interest". Following this, clear sub-categories for policies and procedures should begin to define themselves to the drafter. Under the sub-categories the drafter would begin to highlight the policies, the "what" and "why" of the topic and if required, the procedures, the "how". The end of the template includes the "Table of Approval" which highlights when the document was last updated and/or approved and when it is due for review again. The design of the template is created to allow policy and procedures to be combined into the same document as this is an external document and there are very few procedures. In the future, the FSJPLA may want to consider having separate procedure documents for new policies if the procedures are

lengthy or best suited on their own. These documents should follow the same template or if that is not desirable, a new template designed to create consistency moving forward.

5.8 Summary of the Policies and Procedures Recommended for the 2015 FSJPLA Policy and Procedure Manual

The Board of Trustees Policy and Procedures is the lengthiest of the recommended policy and procedures. This policy and procedure was developed to assist in the maintenance of transparent oversight and to help create strong community confidence in the FSJPLA Board of Trustees. The document relies heavily on the Library Act (BC) as it is the basis for the Board of Trustees. The authority and structure of the Board are further clarified in the document and membership from the City of Fort St John and the Peace River Regional District confirmed. Trustee responsibilities and knowledge requirements are documented along with the duties of the Board Chair, Vice-Chair, Treasurer and Secretary. To ensure that trustees are in agreement, parameters around Board meetings are set along with rules of conduct. This Policy and Procedures should be the starting point for any new Board trustee as well as reviewed and referenced by all current Board trustees on a regular basis.

The scan of libraries in Canada did not show documents readily available for highlighting policies and procedures processes within an organization. This is likely because organizations have kept these processes internal or that they have not created them. Even though the Fort St John Public Library Association Policy and Procedures Process is primarily directed at internal users it is beneficial to have them included in the FSJPLA external manual. This short process document provides manual users with an understanding as to how the FSJPLA creates, modifies or deletes policies and process. If a patron or member has concern with a policy or procedure, they have the ability to inform the FSJPLA and the process document provides them knowledge of the framework the FSJPLA will use to consider the input. Sharing this document in the 2015 Manual creates a level of transparency and inclusiveness for all FSJPLA patrons. The process document is designed for someone with an intermediate level of knowledge relating to policy and procedures and as such, those within the FSJPLA more familiar with policies and procedures will either lead the tasks or assist with them. As the FSJPLA begins to utilize this process they may find the need to expand on it or further clarify process or direction, depending on staff needs and understanding.

The Membership, Borrowing and Fees Policy and Procedure is anticipated to be one of the most referenced policy and procedures in the 2015 Manual. Portions of this policy and procedure are likely to end up on the FSJPLA website under topics such as FAQs and in information handouts or posters. This document clarifies how one can become a member of the FSJPLA and the different memberships available for patrons. The obligations that flow through a membership, such as fines, how to obtain resources and materials, appropriate use and care of materials and rates for rentals and services are set through this policy and procedure. The FSJPLA must be cognizant of rewriting portions of this policy and procedure in too many locations as they will all need to be updated if the approved policy and procedure is. Given this, if the reference is digital, it is recommended a link to the 2015 Manual be provided instead of portions being transcribed out of it.

The General Operations Policy and Procedures is the document that captures topics that are not captured elsewhere and are not of significant length or importance to be drafted in a standalone document. This document outlines: conduct on library premises, posting of materials on library premises, exam invigilation, homebound services and unattended children. Conduct while on library premises is a topic that most patrons will naturally adhere to. The General Operations policy provides FSJPLA staff a reference and framework if an individual is acting inappropriately. The FSJPLA allows some materials to be posted on premises and the advertising and posting section defines what is appropriate as well as the procedure for posting the materials. To assist those pursuing education from a distance,

the FSJPLA offers exam invigilation. There were not a lot of libraries that have publicly posted frameworks with respect to exam invigilation, perhaps because in larger centers it is not conducted through public libraries as often. As such, the Portland Public Library provided a good resource for information with respect to appropriate conduct with respect to this topic. The General Operations Policy also covers the home delivery service that the FSJPLA provides along with process respecting unattended children.

The Computer and Internet Use Policy and Procedures is one that could require frequent updates as technology changes. In a review of other library policies and procedures, the ones relating to computer and internet tended to appear outdated the most often, for example, referencing outdated products or social media that is no longer the norm, such as “myspace” instead of “Facebook” or “Instagram”. The FSJPLA provides the public with computers and internet access along with Wi-Fi free of charge. In an area where internet is not always available outside of city limits and patrons can be transient workers or individuals arriving in the city to secure employment and housing the FSJPLA has experienced a continual increased use of their computers and Wi-Fi (FSJPLA, 2014a). The policy and procedure provides a platform for users and staff relating to security and what use is appropriate as well as general requirements and procedures such as how to log-in to the Wi-Fi. As with the Membership, Borrowing and Fines Policy and Procedures, the Computer and Internet Use Policy and Procedure may have portions of it posted elsewhere. The FSJPLA will need to be cognizant that all documents and postings will require updating if this policy and procedure is updated and should provide links to the 2015 Manual where possible instead of excerpting portions.

The FSJPLA is a progressive library and as such promotes and encourages freedom of expression through social media avenues and its website. The Social Media and FSJ Public Library Website Policy and Procedures allow staff and users to understand how social media and the FSJPLA website are used and what is appropriate with respect to their use. As an organization that collects personal information, the FSJPLA makes transparent in the policy and procedure what information is and is not tracked. Social media can provide a powerful medium for advertising and information sharing as well as provide the individuals to express their thoughts freely, but there can be individuals or groups who create undesirable outcomes on these forums. As such, the social media framework outlines who is responsible for the FSJPLA social media sites and what is and isn't acceptable for posting.

The Access to Information and Protection of Privacy Policy and Procedures upholds the FSJPLA's intent to create an environment where individuals can explore their ideas and views while maintaining a respectful level of privacy and defining how the FSJPLA will conduct itself to uphold legal requirements under federal and provincial statutes. The FSJPLA is subject to FOIPPA and as such must ensure they understand and are compliant with the Act. Even though the chance of the FSJPLA receiving a FOIPPA request that is complicated in nature is low, there is a risk of the FSJPLA inadvertently contravening FOIPPA in their collection of personal information, primarily during membership registration. The policy and procedures created around information and the protection of privacy are to reduce the risk to the FSJPLA. The policy and procedures outline to patrons and members what information the FSJPLA does collect and what the information may be used for, ensuring transparency for those that are providing information.

Safety Policy and Procedures are standard for any organization. BC and Canada have extensive regulations to protect worker safety and the Safety Policy and Procedures is created to assist with an understanding of safety for employees and all patrons. The FSJPLA is located in the North Peace Cultural Center (NPCC). The NPCC has its own requirements with respect to safety and as they develop their policies, the FSJPLA will need to ensure that its policy and procedure aligns. The Safety Policy and Procedure outlines employee and employer responsibilities, individual responsibilities for safe conduct,

safety protocols, hazardous materials and objects and potential evacuations of library premises. It is recommended this Policy and Procedure be posted in hard copy at every exit, at the front desk and staff room. The external Safety Policy and Procedures may be complimented by an internal policy. It is recommended that the FSJPLA make as much information as possible available externally to ensure patrons, as well as staff, understand the protocols.

The Accessibility and Inclusion Policy and Procedures is created to align with the CLA Statement on Diversity and Inclusion and to support the FSJPLA in its goal of providing excellent customer service to all patrons, including providing equal access to library programs, services, materials and facilities. Key to this policy and procedures is the statement that disabilities and barriers may not always be outwardly identifiable and that staff should be empathetic towards all who express their disability or barrier. The policy and procedure also places some responsibility on patrons, encouraging them to express their disability to staff so they can be better assisted and the FSJPLA can have the resources available to make their use of maximum benefit. Library diversity is a key focus for the FSJPLA. Not only does it strive to maintain materials reflecting a diverse group of users, but it has also created programs to welcome all onto its premises. For example, the Queer-Straight Alliance (QSA) group meets the first Thursday of every month, bringing together lesbian, gay, bisexual, transgender, two-spirited, queer or questioning youths along with their families for fun activities (FSJPLA, 2015b).

Material Acquisitions and Disposal Policy and Procedures tended to be common in most libraries. This policy and procedure documents how the FSJPLA will maintain a broad range of up to date materials and as well dispose of materials no longer required, while upholding the CLA Statement on Intellectual Freedom. Creating a policy and procedure for material acquisitions and disposals creates transparency and ensures that the FSJPLA is consistent in their approach and that the reasoning behind additions and removals are done based with integrity principles in mind and to the best extent possible, without prejudice by the individuals making the decisions.

Financial Policy and Procedures allow the FSJPLA to ensure that there is a common understanding within the FSJPLA and to its patrons and supporters to maximize the limited financial resources available. The policy and procedures demonstrates to donors and supporters that the FSJPLA values their support and will utilize funds appropriately. The policy and procedure has makes expense claims a public facing document, which does not appear to be the norm within the library setting but is for other types of non-profit organizations. As the FSJPLA is an association that relies heavily on the public for support, it is recommended they keep these policies and procedures publicly available to remain transparent. Posting information around expenses ensures that staff is aware of spending parameters prior to making the expense, and allows for consistency in the application of expenses, such as service awards and staff appreciation. The FSJPLA indicated that it does not require regular contractor work and as such, the manual does not go into extensive detail, but does set basic parameters. Because of this, if the FSJPLA is entering into contracts, it is recommended they review the policy and procedure and update appropriately to ensure any contracts created are well written. The FSJPLA currently utilizes space in the NPCC, but has indicated they are requiring some space planning in the future and as such, this policy addresses potential expenses for either modifications to an existing location or relocation. The policy and procedure has a placeholder for library reserve funds, which the Board will provide input to for drafting.

Sponsorships, grants and donations are of prime importance to the FSJPLA. Much of the fundraising is conducted through the Friends of the Fort St John Public Library. The FSJPLA is ultimately responsible for all funds that it raised and utilized and as such a policy and procedure document creates a transparent framework for the acceptance of gifts and donated materials. Donations can be large or small, one time or on a continual basis. The policy and procedure outlines what appropriate gifts are and what the

FSJPLA may or may not do with them. There are statements created around sponsorships and how the funds will be accounted for, but also the FSJPLA's liability relating to potential and realized sponsors and their view of the sponsors. It is unlikely that the library will have an issue with a sponsor. Policies and procedures are drafted to provide guidance in such cases and as such, this policy outlines some of the potential issues and what the library's responsibilities are.

The twelve policies in the manual provide the FSJPLA with a framework for consistent operations. These policies are ones that are not anticipated to fluctuate often and will provide the backbone for the manual over an extended period. The 2015 Manual covers a broad spectrum of items, and at almost fifty pages it is a lot for staff or interested individuals to know. The table of contents allows for a quick scan of the document, and from there the individuals can read the sections that are appropriate to their interests.

6.0 Moving Forward

The FSJPLA will be responsible for the 2015 Manual and the creation and modification of policies and procedures moving forward. The Board is ultimately responsible in ensuring the success of the manual, while the staff and patrons' that are most impacted by its use. Because of this, there must be mechanisms put in place to make sure that it gets used and updated as required. Shifting to the 2015 manual will require a mindset shift within the organization. Given that staff does have some internal procedure documents and that the FSJPLA does have the 2009 Manual currently in use, the implementation of the 2015 Manual should flow smoothly. A powerful way to get individuals using the 2015 Manual is to refer to it instead of answering questions. For example, if an employee asks the Director what the fine for an overdue book is, instead of the Director indicating the amount, she/he should indicate to the employee to check the 2015 Manual and come back if they still have questions. The same action can be taken by employees. If a patron asks an employee what the rules around computer use are, they should refer the patron to the Computer and Internet Use Policy and Procedure and follow up to see if they have any questions. The reference to the documents ensures that the correct information is shared and it also creates a check point to know if the policies and procedures are covering the topics required and if the information is correct or useful.

Given that the FSJPLA has placed considerable focus on creating a new user friendly, fun website, they may want to take portions of the policies and procedures and use them on different webpages such as the FAQs. This creates consistent wording and information for all to view, and makes it so that information is readily available. If the FSJPLA does decide to place portions of the policies and procedures in different areas, whether it be by posting it on the website or hardcopies distributed, they should be making note of these locations for each policy and procedure, as each copy will need to be updated as the policies and procedures are updated.

This project has created a foundation for the FSJPLA to build off of. Next steps for the FSJPLA will be for the Board to provide feedback and final approval and then for implementation. It is recommended that the FSJPLA place an announcement on their website and social media pages regarding the new manual and, as well, add topics relating to the manual to regularly scheduled staff and board meetings. To ensure that the FSJPLA continues to grow its policy and procedure development, it is recommended that responsibility for either the entire manual or portions of the manual be placed into individual job descriptions and performance reviews. The FSJPLA is a cornerstone in the northern community it serves and will continue to be such for many years. It is intended that the 2015 Manual will provide operational support as the library moves forward into the next strategic planning cycle.

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Appendix A – The Manual



Fort St John Public Library Association

Policies and Procedures Manual

***Note: For the purposes of this MPA 598 project, citations have been included in the manual. As it is not the norm to publish citations in policy and procedure manuals, the final version for Board Approval does not include citations.**

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1.0 Board of Trustees Policy and Procedures

1.1 Purpose and Statements

The Fort St. John Library Association (FSJPLA) Board of Trustees (Board) is an integral player in the oversight and strategy development of the FSJPLA. The Board is comprised primarily of volunteers whose values and knowledge make the FSJPLA a cornerstone for the community it serves. In order to maintain transparent oversight and strong community confidence, the FSJPLA has developed the Board of Trustees Policy and Procedures.

1.2 Application

This Policy and Procedure applies to all members of the Board of Trustees and those affected by the Board's actions.

1.3 Authority

Revisions to this document can be authorized by the FSJPLA Board as defined by the Library Act (BC)

1.4 Legislation of Interest

Library Act

Freedom of Information and Protection of Privacy Act

1.5 Policies and Procedures for the Board of Trustees

1.5.1 Authority and Structure of the Board

- FSJPLA will post Board Membership on its website;
- The Board derives its authority from Part 4 of the Library Act (BC), which defines:
 - Who can and cannot vote or hold office;
 - Continuation of the role of the library board;
 - Composition of the library board;
 - Elections and term of office of members;
 - Election of chair and vice chair;
 - Regular and special meetings of the library board;
 - General powers and duties of library board;
 - Budget, expenditures and financial statements.
- The Board is comprised of nine trustees and three appointed members:
 - Nine (9) elected through the Annual General meeting (AGM) for a term of two (2) years;
 - Five (5) positions will be up for nomination one year, four (4) the following year.
 - One (1) member appointed by the City of Fort St John Council;

- o One (1) appointed representative from each Areas B and C of the Peace River Regional District (FSJPLA, 2009);
- No member shall serve as a trustee for more than eight (8) years (Queen’s Printer, 2015b), with no more than seven (7) years in the same executive position (FSJPLA, 2009);
- Trustees cannot be or have relations to employees of the FSJPLA;

1.5.2 Responsibilities of the Board

- Responsibilities:
 - o To oversee and manage the finances for the FSJPLA;
 - o To set strategic direction for the FSJPLA and ensure its implementation;
 - o To ensure policies and procedures adequately reflect the operational needs of the FSJPLA;
 - o To form a negotiations committee responsible for the negotiation and sign-off of collective agreements;
 - o To hire the Director of Library Services;
 - o To obtain legal services should the situation arise;
 - o To authorize goods and services greater than \$10,000;
- Trustees must be familiar with the Library Act (BC);
- Upon commencement of duties each trustee must receive and conduct themselves in accordance with the Effective Board Member Handbook;
- Trustees must be familiar with:
 - o FSJPLA Policies and Procedures;
 - o Meeting minutes for the previous year;
 - o Library history and operations;
 - o Other trustee, staff and associates names, positions and responsibilities;
 - o BC Library Statistics;
 - o FSJPLA Strategic Plan, Annual Reports Policies and Procedures and Budgets;
 - o FSJPLA BCGEU Contract.
- One Board Trustee will represent the FSJPLA on the North East Library Federation (NELF). The member will attend all NELF meetings and report updates to the Board in writing:
 - o When required by NELF the Trustee has signing authority on behalf of the FSJPLA on policy or NELF affairs, but not financial;
 - o When unable to attend a NELF meeting the trustee will seek to identify a designate. If no trustees are available the Trustee will notify NELF in advance of the meeting.
- Board Executive shall consist of: Chair, Vice-chair, Treasurer and Secretary.

1.5.3 Duties of the Board Chair

- No trustee shall act as the Board Chair (Chair) unless doing so in conjunction with Section 37 of the Library Act (BC);
- The Chair will conduct itself in accordance with the Board Chair Handbook as distributed by the BC Library Trustees’ Association (FSJPLA, 2009);

- The Chair may choose to delegate responsibilities in alignment with the Library Act (BC);
- The Chair remains responsible for delegated responsibilities;
- Responsibilities:
 - Chairs the meetings in alignment with the current version of Robert's Rules of Order;
 - Calls all Board meetings;
 - Finalizes and approves Board meeting agendas as drafted by Director of Library Services;
 - Provides signature of meeting minutes upon Trustee approval;
 - Represents the Board and FSJPLA on matters working with the Fort St John Municipal Council and Peace River Regional District (West Vancouver Memorial Library [WVML], 2013);
 - Represents the Board and FSJPLA when responding to public questions and media enquiries;
 - With input from Trustees, library staff and stakeholders, conducts an annual performance review of the Director of Library Services (WVML, 2013);
 - Acts as a signing authority when Board authorization is required;
 - Facilitates establishment of the Strategic Plan and conducts final sign-off for implementation;
 - Creates committees at their discretion or the recommendation of the Board Trustees;
 - Is a voting member of the Board.

1.5.4 Duties of the Board Vice-Chair

- The Vice-Chair has the powers of the Chair as per Section 37(2) of the Library Act (BC);
- May be authorized as a signing officer.

1.5.5 Duties of the Treasurer

- Is an authorized signing officer;
- Is a member of the Finance Committee (FJSPLA, 2009);
- Is responsible in ensuring the FSJPLA meets its obligations with the Canada Revenue Agency (CRA), including filing annual reports to CRA and BC Registry Services (FSJPLA, 2009);
- Assists the Finance Committee with financial matters by overseeing bookkeeping, and financial statements, including year-end and presenting them at the AGM (FSJPLA, 2009);
- Assists the Board in the preparation of the annual budget prior to September 15th of each year and presents this budget to the fund-granting authorities and the general public;
- The FSJPLA Fiscal Year is January 1-December 31.

1.5.6 Duties of the Chief Librarian

- The Chief Librarian is appointed by the Board as the FSJPLA Director of Library Services;
- The Chief Librarian's duties as defined in the Library Act are:
 - General supervision and direction of the library and its staff
 - The secretary to the library board and to the public library association, and

- Powers and duties the library board assigns to the chief librarian from time to time (Queen’s Printer, 2015b).
- The Board will define the Director of Library Services powers and duties through its job description which will be reviewed and updated on an annual basis as well as direction derived from Board meetings.

1.5.7 Duties of the Secretary

- Maintain books and financial records under the direction of the Treasurer;
- Maintains records of meeting proceedings;
- Maintains records of all relevant Board communication;
- Distributes meeting minutes along with upcoming agendas and material for review to each of the trustees a minimum of one week prior to a Board meeting;
- Confirms trustee attendance for meetings one week prior and informs the Board Chair if quorum will not be met at least 24 hours prior to the meeting;
- Is an authorized signing officer.

1.5.8 Board Meetings

- Trustees are expected to attend all Board meetings;
- If a Trustee is absent from three consecutive regular meetings without prior discussion with the Chair, their position is deemed vacated (FSJPLA, 2009);
- Trustees shall notify the Chair of a planned absence from a scheduled Board meeting;
- Quorum for meetings is five trustees;
- Trustees will review and approve meeting agendas at the start of each meeting. Pressing items not on the agenda may be proposed and voted on to be added for discussion;
- Meetings are held monthly, with dates determined for the upcoming year at the AGM. The Board may choose to forgo meetings in July, August and December (FSJPLA, 2009);
- A special meeting can be called by a minimum of three Trustees, or by the Chair (FSJPLA, 2009);
- Board meeting schedules will be posted on the FSJPLA website;
- The public is invited to attend Board meetings;
- The Board will host an AGM in the month of April on a date fixed at the January meeting (FSJPLA, 2009);
- The date and location of the AGM must be advertised in advance on the FSJPLA website and through social media.

1.5.9 Board Conduct

- Board Trustees must not disclose private or privileged information received during their time serving the FSJPLA as Trustees, or once their term of service has concluded;
- Library property provided to Trustees in order to perform their assigned duties must not be used for illegal activities or personal benefit and must be returned at the end of their term (WVML, 2013);

- Trustees must conduct themselves in a professional manner, and not use their position with the FSJPLA Board to leverage personal agendas;
- Statements made on behalf of the Board must be done by the Chair or his/her designate;
- Trustees must fully disclose, in writing, to the Board of Trustees, if they are potentially in perceived or real conflict of interest on decisions relating to contracts, transactions or situational outcomes (WVML, 2013);
- Trustees shall not participate in debate, discussions or negotiations where they may be in a real or perceived conflict; however, they may be present to answer specific questions and provide clarification to other trustees.

1.5.10 Board Committees

- The FSJPLA Board Committees are:
 - Finance and Revenue Development;
 - Management and Personnel;
 - Facilities;
 - Strategic Planning and Policy Review;
 - Others as approved by the Board.

1.6 Table of Approval

Original Approval	
Date of Revision	
Scheduled Review	
Signature of Approval	

2.0 Fort St John Public Library Association Policy and Procedures Process

2.1 Purpose and Statements

The Fort St John Public Library Association (FSJPLA) has developed and implemented several policies in order to best serve its patrons and members, guide staff, volunteers and Board Trustees and uphold its strategic plans while achieving its mission vision and values. This policy and procedure is developed as the overarching framework to ensure the suite of policy and procedures remain in line with operational objectives, making them a valuable tool.

2.2 Application

This Policy and Procedure applies to library staff and Board trustees.

2.3 Authority

Revisions to this document can be authorized by the FSJPLA Board of Trustees

2.4 Legislation of Interest

Library Act

2.5 Policies and Procedures Process

2.5.1 Responsibility

The overarching responsibility for all FSJPLA policy and procedures lies with the Board of Trustees, coordinated by the Director of Library Services. All staff, volunteers, Board Trustees and patrons have a role to identify and bring forward to the Director, policy and procedure gaps and misinformation, along with suggested changes. Individual policy and procedure documents outline those responsible for sign-off, revisions, and deletions. New policy topics shall be brought forth to the Director for decision to proceed to policy and procedure development.

2.5.2 Policy Distribution

The FSJPLA will strive to make all policies and procedures available to the public, with the exception of documents designed for internal use or that contain confidential information.

2.5.3 Policy Review

- Existing policies will be reviewed on an annual basis, or earlier if a need is identified;
- Each policy will have the review date updated annually;
- The policy review will determine: if the policy is still needed, what needs to be added to the policy, and what needs to be removed from the policy;

- Additions or deletions of policies or procedures will be brought forward first to the Director of Library Services for consideration, and then to the Board for review once it is drafted;
- External policies will be posted on the [FSJPLA website](#) and internal policies will be shared on the Staff Information Portal within two weeks of sign-off.

2.5.4 FSJPLA Policy and Procedures Maintenance

The following table will be maintained by the Director of Library Services as policies and procedures are added, deleted and updated

Policy and Procedure	Date for Review
FSJPLA Policy and Procedures Process	January 2016
Computer and Internet Use	January 2016
Membership, Borrowing and Fees	January 2016
Safety	February 2016
Social Media and FSJPLA Website	February 2016
Financial	March 2016
General Operations	April 2016
Board of Trustees	May 2016
Internal	June 2016
Sponsorship and Fundraising	September 2016
Material Acquisitions and Disposal	September 2016
Access to Information and Protection of Privacy	October 2016
Accessibility and Inclusion	November 2016

2.5.4 Information on Policy and Procedures

- Policies and procedures are developed to support the FSJPLA staff, volunteers, Board trustees and patrons in achieving a common understanding of relevant legislation, and operational requirements and practices while supporting the FSJPLA in achieving its strategic goals and mission, vision and values;
- A policy is the “what and why”, the rule what the FSJPLA is outlining;

- A procedure is the “how”, what organizational actions are required to achieve the policy (Campbell, 1998 p.2-3);
- The FSJPLA will combine policies and procedures into one document by topic;
- Procedures will be separated from policy statements, or combined, whichever is most logical for the user;
- The FSJPLA will consider the development of policy and/or procedure when:
 - There is an area in which inconsistent principles are being applied and consistency is required;
 - A topic is complex or essential to the organization and requires defined process;
 - Few individuals know the policy/procedure and there is a risk of knowledge loss if they leave or are absent from the FSJPLA;
 - The topic can be defined and clarified through a policy or procedure (Campbell, 1998 p7-8).
- Individuals proposing a policy or procedure will:
 - Determine if a policy/procedure is required on the subject matter and discuss it with the Director of Library Services;
 - Determine what is already existing on the subject matter, including legislation, within the FSJPLA and with other libraries and organizations;
 - Review the template for policies and procedures;
 - Address the following questions:
 - Why is the policy/procedure being written? What is its purpose?
 - Who is the intended audience?
 - What legislation already addresses this topic?
 - What are the main topics for the policy?
 - Ensure the document can be understood and implemented by someone not familiar with the topic;
 - Forward to Director for review and consideration to be brought forth to the Board.

2.6 Table of Approval

Original Approval	
Date of Revision	
Scheduled Review	
Signature of Approval	

3.0 Membership, Borrowing and Fees Policy and Procedures

3.1 Purpose and Statements

This policy and procedure identifies who can become a member of the Fort St John Public Library Association (FSJPLA) and how they can access library resources. It clarifies privileges for members and when these privileges may be restricted. To ensure members have information relating to fees and fines available to them, the FSJPLA has outlined them within this document.

3.2 Application

This Policy and Procedure applies to library staff, volunteers and Board Trustees as well as patrons wishing to become members and members of the FSJPLA.

3.3 Authority:

Revisions to this document can be authorized by the FSJPLA Board of Trustees

3.4 Legislation of Interest

Library Act

Freedom of Information and Protection of Privacy Act

3.5 Policies and Procedures for Membership, Borrowing and Fees

3.5.1 Memberships and Cards

- Changes to address, name or phone number must be updated as soon as possible;
- Loss or theft of a library card must be reported immediately. Members may be held responsible for materials borrowed on a card, including fines, if the theft is unreported (Toronto Public Library [TPL], 2015);
- Library cards are not kept on file and must be presented to borrow materials. There is a \$5 replacement fee for lost cards;
- Library cards are non-transferable;
- Library cards remain the property of the FSJPLA and must be returned upon request;
- Reciprocal borrowers are defined as borrowers who hold a valid BC One Card or are members of the Northeast Library Federation libraries.

3.5.2 Membership for FSJPL

- All patrons over the age of five must register for a membership at the FSJPLA;
- Members will be provided access to their membership accounts through MyFSJPL;
- MyFSJPL will allow members to:

- Update their contact information;
- Authorize others to utilize their membership;
- Define profile criteria such as retaining history, renewing items and renewing and returning of digital items.
- Juvenile members are between the ages of five and sixteen;
- Parents or guardians are required to sign the back of the juvenile member’s card. The parent or guardian assumes responsibility for the return of books, payment of fines and screening of materials for juvenile patrons (FSJPLA, 2009);
- Juvenile members have access to all library materials with the exception of DVDs labelled with “R” ratings which are only available to members over eighteen (18);
- Children under the age of five (5) are required to utilize their parent’s or guardian’s card (FSJPLA, 2009);
- All library cards expire after three (3) years and an account must be in good standing to be renewed;
- There is a limit of 25 items at any one time per member except by temporary members and reciprocal borrowers;
 - With a limit of 4 DVDs or 4 Audiobooks.

3.5.3 Membership for BC One Card

- A BC resident not eligible for a FSJPLA membership card, may still eligible for a BC OneCard;
- BC OneCard membership will be incorporated into the individual’s home library membership card and entered into the Integrated Library System;
- BC OneCards are made available through a member’s home library and must be maintained prior to trying to borrow items from the FSJPLA;
- BC OneCard patrons residing outside the area covered by libraries that make up NorthEast Library Federation (NELF) – maximum number of books in cardholder possession will not exceed five (5) at any one time;
- For patrons of NELF member libraries – maximum number of books and media in cardholder’s possession will not exceed ten (10) at any one time;
- At the present time only books are covered by the BC OneCard program;
- The FSJPLA will issue BC OneCards to its members that meet the requirements for use in other libraries across the province (FSJPLA, 2009).

3.5.4 Temporary Membership

- Temporary Memberships are made available for individuals living outside of the City of Fort St John or Peace River Regional District Areas B and C that do not have a BC OneCard;
- The FSJPLA requires a non-refundable fees of:
 - \$20 for a single membership
 - \$30 for a family membership.
- Temporary members must provide a form of government issued identification, an email address, and if available, a phone number when registering;

- Temporary Memberships are valid for 6 months from the date of issuance;
- Temporary Members receive the same privileges and maintain the same responsibilities as regular FSJPLA members with the exception of:
 - The maximum number of items must not exceed five (5) for single members or twenty (20) for families at one time (FSJPLA, 2009);

3.5.5 Mini Membership

- The FSJPLA recognizes that it has patrons requiring a membership that do not meet requirements or have the means to obtain a BC OneCard, Temporary Membership or full membership;
- A Mini-Membership is offered to these patrons to allow the FSJPLA to provide equal access to all;
- Mini-Memberships are available to individuals sixteen (16) years or greater and they must provide:
 - Their full name;
 - A phone number or email address if available;
 - A signature on the back of their library card agreeing to make all reasonable efforts to adhere to the statement on the card.
- Mini-Memberships expire three (3) months after activation;
 - At expiry the FSJPLA will determine if the membership can be renewed for a further three months or if the member meets the requirements for another type of membership;
- Mini-Memberships provide for a maximum of two (2) books or magazines and one (1) DVD/AudioCD/MusicCD at one time;
- Borrowing periods remain consistent with other membership types;
- FSJPLA may waive late fines, recovery and replacement costs and lost card fees for mini-membership card holders (France, 2015).

3.5.6 Borrowing Privileges

- To borrow items from the FSJPLA, a Member's account must be in good standing. Members with accounts that have exceeded the maximum amounts may have their borrowing privileges suspended or revoked;
- Materials may be borrowed for a 4-week period except:
 - Magazines — two (2) weeks (circulating copies only);
 - DVD's— two (2) weeks;
 - Identified Materials in high demand — overnight to two (2) weeks, as stated in the library;
 - Music CDs – two (2) weeks;
 - Audiobooks – four (4) weeks (FSJPLA, 2009).

3.5.7 Fines and Book Loss

- Fines and book loss charges apply equally to members, staff and Board Trustees;
- The Board will determine fines and charges for overdue, lost or damaged materials to be administered by FSJPLA employees as outlined in this policy (FSJPLA, 2009);

3.5.8 Fines

- Overdue fines of \$0.20 per day per book up to a maximum of \$10.00 for hardcover and \$4.00 for paperbacks;
- Overdue fines of \$1.00 per day to a maximum of \$20.00 for video material such as DVDs;
- Fines for magazines shall be \$0.20 per magazine, per day up to a maximum fine of \$3.00 per magazine;
- Overdue fines of \$0.20 per day per audio book up to a maximum of \$10.00 per audio book (FSJPLA, 2009).

3.5.9 Materials Lost or Destroyed

- Replacement cost for hardcover books will be the cost as shown in the latest edition of Books in Print or Canadian Books in Print plus \$4.00 for cataloguing fees. If no price is found, the charge will be \$20.00 or, replacement of the book plus \$4.00 restocking charge;
- Hardcover Books no longer in print will be rated at the shelf list price plus \$4.00 for cataloguing fees. If no shelf list price, the charge is \$20.00 or the replacement cost of book plus \$4.00 restocking charge;
- Lost or destroyed paperbacks will have a charge of the shelf list price of the book plus a \$4.00 charge for cataloguing and restocking;
- Magazines — replacement cost or a minimum of \$3.00;
- Lost or destroyed audiovisual material will have a charge of replacement cost plus \$4.00;
- Water damaged books will be charged as “materials lost or destroyed.” Any books with damaged covers will be treated as destroyed books;
- Rates for materials requiring repair are determined at the Director of Library Services’ discretion;
- Minor damage is at a rate of \$2.00-\$4.00 minimum for loose sections, broken bindings etc. or a figure set by the Director;
- Once a full replacement cost has been paid for lost materials, the FSJPLA can choose to retain, dispose of or sell the damaged materials with no compensation to the member;
- If a replacement cost has been paid and the lost materials are returned within one month, the FSJPLA will consider reimbursement for the replacement cost minus fines accumulated;
- In-Library Use Materials —a deposit may be required as determined by the Director of Library Services if a member requests and is approved to remove the materials from the library (FSJPLA, 2009).

3.5.10 Non-Book Materials and Equipment

- The FSJPLA is not responsible for damage to any equipment or software that could be incurred during the use of library materials such as videos, CDs, DVDs, etc.;

- DVDs and Audio Books:
 - Late fines are \$1.00 a day to maximum or \$10 per DVD or audio book;
 - Lost or destroyed items will have a charge of replacement cost plus \$4.00 (FSJPLA, 2009).

3.5.11 Maximum Fines

- Maximum allowable fines on Juvenile cards is \$25;
- Maximum allowable fines on Adult cards is \$50;
- A member's account will remain in good standing if a member clears fines on their card or pays a minimum of 20% of the total fines each time they borrow items;
- If maximum fines are exceeded, the member will have a suspension on their account until fines are brought to 20% below the maximum (FSJPLA, 2009 and France, 2015).

3.5.12 Equipment Rental Rates

- Borrowers are responsible for replacement or repair costs for all equipment damaged while on loan;
- Equipment Rental Rates are:
 - Digital Projector - \$20.00 per day;
 - Screen - \$10.00 per day;
 - TV with HDMI cable to be used within Cultural Centre - \$15.00 per day (FSJPLA, 2009).

3.5.13 Miscellaneous Rates

- Laminating - \$ 2.00 per running foot;
- Exam Invigilation - \$30.00 per hour;
- Ear Bud Purchase - \$3.00 per pair;
- USB Storage Device Purchase - \$8.00 per USB (France, 2015).

3.5.14 Printing, Scanning, Copying and Fax Rates

- Printing and Copying:
 - Black and White Letter and Legal Sizes - \$0.25 per page;
 - Black and White 11X17 - \$0.50 per page;
 - Colour Letter and Legal Sizes - \$0.75 per page;
 - Colour 11X17 - \$1.50 per page;
- Scan and Email - \$0.50 per document;
- Faxing:
 - Local or toll-free numbers- \$0.50 per page;
 - Long Distance within Canada- \$2 first page, \$1 for additional pages;
 - Outside Canada - \$6 first page, \$2 for additional pages;
 - Fax Receiving - \$0.50 per page (France, 2015).

3.5.15 Provincial Inter-library Loans and Reservations

- There will be no charges for inter-library loans unless a lending library charges a fee;
- Provincial inter-library loans are for books only;
- Each patron may request up to 4 books at any one time;
- Requests can be made online, via phone or in person;
- The member's library account must be in good standing;
- Once the patron has been notified, the library will keep the book(s) for a period of one week. If the order is not retrieved, the book(s) will be returned to the lending library or will be returned to FSJPLA shelves;
- Fines for inter-library loans/reserves will be charged as per any other book. Patrons consistently ordering inter-library materials that do not pick them up may lose the ability to place the requests;
- The loan period on inter-library loans will be as per FSJPLA policy.

3.5.16 Provincial Inter-library Loan Procedure

- Books must be at least one year old in order to be borrowed through Inter-library Loans;
- Members can anticipate receipt of books within two to six weeks of placing the request;
- Inter-library loaned books cannot be renewed or reordered immediately upon return (FSJPLA, 2009).

3.5.17 Inter-library Connect Loan Procedure

- Interlibrary Connect allows patrons to utilize the FSJPLA's online catalog to access books from nearby library federations
- Requests for inter-library connect materials can be made online through the FSJPLA's catalogue, at the front desk or over the phone;
- Inter-library Connect allows for digital media to be shared between libraries;
- Inter-library Connect libraries will not charge a fee for loans;
- Most Inter-library Connect items can be renewed or reordered.

3.5.18 Digital Subscriptions and Borrowing

- Members must adhere to all copyright laws when borrowing digital materials;
- Members are obligated to adhere to the licensing rules, policies and requirements of the program in which materials are being downloaded, such as Zinio and Overdrive.

3.6 Table of Approval

Original Approval	
Date of Revision	
Scheduled Review	
Signature of Approval	

4.0 General Operations Policy and Procedures

4.1 Purpose and Statements

The General Operations Policies and Procedures allow the FSJPLA to capture topics of interest that are not captured elsewhere.

4.2 Application

This Policy and Procedure applies to FSJPLA patrons and members and staff, volunteers and Board Trustees.

4.3 Authority

Revisions to this document can be authorized by the Director of Library Services.

4.4 Legislation of Interest

[BC Library Act](#)

4.5 Policies and Procedures for General Operations

4.5.1 Conduct While On Library Premises

- All patrons, members and staff are expected to act in a respectful and non-intrusive manner while on library premises;
- The following actions may be considered unacceptable on library premises and as such the offender may be asked to discontinue the activity or remove themselves from the property:
 - Failing to cooperate with staff or other patrons;
 - Physical behaviour (running, jumping, pushing etc.) or activity that may result in damage to library property and materials or harm to individuals;
 - Consuming or being under the influence of alcohol or drugs;
 - Smoking or vaping in non-designated areas;
 - Bringing animals other than designated guide animals on site;
 - Unlawful activities (WVML, 2013);
 - Sleeping or loitering for extended periods;
 - Swearing, yelling or being verbally offensive;
 - Disruptive cell phone use, rings or noises;
 - Failing to wear appropriate clothing, including shirts and shoes;
 - Soliciting;
 - Taking library materials offsite without authorization;
 - Bringing bicycles, skateboards or scooters into the library;
 - Recording or photographing individuals or materials without consent (Okanagan Regional Library [ORL, 2015];

- Damage to library premises or materials by a patron may result in the FSJPLA requesting compensation for cost-recovery to repair the damage for the future use and enjoyment of others;
- Patrons are required to use the main entrances and exits unless of emergency;
- Patrons are not allowed in staff-only areas;
- Non-staff members on contract, or performing a service for FSJPLA, such as delivery personal and maintenance staff must have permission to access staff only areas;
- Strong or intrusive scents, including body odor, or a lack of personal hygiene as well as added perfumes/colognes, deodorants, etc. are not tolerated on library premises (Wood Buffalo Regional Library [WBRL], 2013).

4.5.2 Advertising and Posting on FSJPLA Premises

- All materials posted on library premises must align with FSJPLA Mission, Vision and Values as well as all policies and procedures;
- Materials may only be posted in designated posting locations;
- All materials posted must receive prior permission and a date stamp;
- Materials will remain posted until the event occurs or a maximum of two weeks, whichever is shorter;
- Library posting space is designated for community events, non-profits, fundraisers and information sharing. Space is not designated for business advertising;
- Petitions are not acceptable as posting material;
- Events charging a fee cannot be posted in library space unless the posting explicitly states the fee is raising funds for a community organization or individual in need (France, 2015);
- While aligning with their own Mission, Vision and Values as well as policies and procedures, FSJPLA reserves the right to refuse any posting that they deem inappropriate without full explanation.

4.5.3 Exam Invigilation

- The FSJPLA offers online and written exam invigilation to those registered in accredited courses;
- Invigilation is conducted at a cost defined in the Membership, Borrowing and Fees Policy and Procedure;
- The Library is unable to provide a private exam room;
- The Examinee may work with the Director of Library Services to schedule an exam outside of regular library hours if possible;
- Requests for invigilation are done by contacting the Director of Library Services at 250-785-3731 (FSJPLA, 2009);
- For web-based exams FSJPLA computers are available;
- FSJPLA computers are to be used for exams unless the institution states that student may use their own;
- The FSJPLA strives to maintain a reliable network and computer system; however, it will not be held responsible if a system error occurs during an exam;

- Invigilation requests should be made at least one week before the exam date and no longer than four weeks before the exam date (Portland Public Library, 2015);
- For written tests, the FSJPLA must receive the test at least three days before the exam date. The test should be addressed to the Director of Library Services;
- Invigilators cannot interpret test instructions or assist in technical matters unless they are specific to library hardware;
- The invigilator is responsible to enforce rules listed in exam materials, including time limits, allowable materials and the restriction of cell phones and mobile devices (Portland Public Library, 2015);
- If the test is in hard copy, the examinee is responsible to provide the FSJPLA an envelope with sufficient postage for the exam to be mailed back to the administering institution;
- It is the responsibility of the examinee to confirm with the institution that the examination was received in satisfactory condition and order;
- The FSJPLA has the right to refuse to invigilate an exam for any reason they deem fit, including insufficient resources or a previous issue with the examinee or the institution.

4.5.4 Home Delivery Services

- The FSJPLA strives to offer patrons who are unable to travel to the library delivery to their home;
- Delivery services are available within the Fort St John Municipal Boundary and Areas B and C of the Peace River Regional District;
- Deliveries from March through to October will occur within a 20km radius of the library;
- Deliveries from November through February will occur within a 10km radius of the library (France, 2015);
- Those within the FSJPLA service area, but outside of the delivery distance will receive Library by Mail at no charge;
- Duration of borrowing periods and fines for materials are as outlined in this policy;
- FSJPLA staff will delivery library materials during normal business hours;
- Deliveries will not take place during extreme weather conditions.

4.5.5 Unattended Children

- Children under 9 must not be in the library without a caregiver or parent over the age of 16;
 - Unattended children will remain with library staff until such time that a responsible caregiver or parent is on site;
 - If FSJPLA staff cannot contact a parent or guardian within 2 hours or prior to the library closing, they will contact the RCMP and wait with the child until the RCMP have arrived.

4.6 Table of Approval

Original Approval	
Date of Revision	

Scheduled Review	
Signature of Approval	

5.0 Computer and Internet Use Policy and Procedures

5.1 Purpose and Statements

In keeping with the Canadian Library Association's Statement of Intellectual Freedom, the Fort St John Public Library Association (FSJPLA) provides Wi-Fi, computer and internet access to patrons, staff, volunteers and Board Trustees. The services provided by the library fulfill its mission and vision, along with supporting strategic goals and initiatives of providing top-notch service for its customers and delivering programming that meets the needs and diversity of the library community. Wi-Fi, computer and internet use have a large array of uses; this policy and procedure document is to ensure that users and the FSJPLA are aligned on appropriate practices.

5.2 Application

This policy applies to all library patrons, employees, volunteers and Board Trustees.

5.3 Authority

Revisions to this policy can be authorized by the FSJPLA Director of Library Services.

5.4 Definitions

- User: refers to individuals utilizing the FSJPLA Wi-Fi, computers and internet.
- Wi-Fi: The wireless connection provided by the FSJPLA that is available for patrons to access through their own phones, tablets, computers or other electronic devices.

5.5 Legislation of Interest

Canadian Personal Information Protection and Electronic Documents Act

Criminal Code of Canada

Canadian Copyright Act

BC Freedom of Information and Protection of Privacy Act

BC Personal Information Protection Act

5.6 Policies and Procedures for Computer and Internet Use

5.6.1 General

- Failure of users to comply with this policy may result in a loss of Wi-Fi, computer use or library privileges;
- The FSJPLA will not be held responsible for the content or accuracy of the information that is found on the internet (FSJPLA, 2009);
- The FSJPLA will not require a patron to have a membership in order to utilize Wi-Fi, computer or internet services;
- Computer and internet users must register with the FSJPLA front desk;
- Wi-Fi users must obtain a log-in code from the front desk;

- Unique log-in slips will be provided to patrons allowing for two hours of Wi-Fi use. Patrons complying with this policy and procedure are able to have multiple slips in one day;
- Certain copying or distribution of material found on the Internet may infringe on copyright or other intellectual property rights. Responsibility for such infringements lies with the user, not the FSJPLA (TPL, 2014);
- FSJPLA computers are provided on a first come first served basis;
- FSJPLA reserves the right to terminate a connection or limit the time allowed without prior notice. Normally, each patron will be allowed one free hour of use on a computer terminal if patrons are waiting. Only on special request will an extension to this time be allowed (e.g. workshops, online courses or orientations etc.) (FSJPLA, 2009);
- Patrons requiring more than the allotted time should notify staff upon arrival and make arrangements to ensure they do not have an unanticipated removal;
- Due to space limitations, there shall be no more than two patrons present at a computer station at a time (FSJPLA, 2009);
- The FSJPLA strives to provide computer users with software that will support their needs. All computers will have the Microsoft Office Suite installed and Photoshop Elements and Adobe Acrobat will be available on a limited basis;
 - There will be no fee charged for software provided by the FSJPLA.

5.6.2 Security and Appropriate Use

- For juvenile members, material restriction is the responsibility of the parent/legal guardian (FSJPLA, 2009);
- FSJPLA does not censor internet content; however, it requires users to respect other library patrons and staff and filter their own content appropriately;
 - Internet and workstation rules will be posted on the [FSJPLA website](#) and in the library;
 - Using of FSJPLA computers, internet or Wi-Fi implies acceptance of posted rules as well as all related policies and procedures;
 - Failure to abide by these rules can result in being dismissed from a workstation.
- Users are subject to federal, provincial and municipal legislation. Utilizing FSJPLA computers, internet or Wi-Fi for illegal purposes is strictly prohibited;
 - Illegal use will be reported in writing to the Director of Library Services and if deemed necessary, the RCMP;
 - The user may be banned from computer, internet and Wi-Fi use in the Library for a defined period or an indefinite period, as determined by the Director, depending on the type and number of times there has been an infraction.
- A FSJPLA staff member may intervene in computer or Wi-Fi use should they be notified that a user is conducting illegal activity or viewing inappropriate materials for a public space;
- Hardware and software must only be added, removed or altered by authorized library staff;
- Materials containing viruses, worms, Trojan horses or other harmful components must not be spread through library computers or Wi-Fi. Users are responsible for damages from such harms (FSJPLA, 2009);
- The FSJPLA is not responsible for any viruses, worms, Trojan horses or other harmful components that a user may encounter and receive damage from, while utilizing the library computers or Wi-Fi;
- The FSJPLA is not responsible for the security and confidentiality of any transactions, including financial transactions (Vancouver Public Library [VPL], 2014);

- Spamming or phishing from library computers or Wi-Fi is prohibited;
- Users must log-out of each station once they have completed their session;
 - FSJPLA staff will log patrons out remotely if a station is left prior to log-out;
 - Patron history, saved files and documents and changed settings are deleted at log-out;
 - The FSJPLA is not responsible for stations left open by patrons.
- Users must not intentionally violate the privacy of another library patron (VPL, 2014);
- The library is not responsible for any fees incurred by the user’s internet or Wi-Fi use (VPL, 2014);
- The library is not responsible for any damage to CDs, DVDs, memory sticks, external hard drives or other such items that a user has connected to a library computer (VPL, 2014);
- Users are required to abide by all FSJPLA policies and procedures and at no time is it acceptable to use FSJPLA computers or Wi-Fi to:
 - Post or share personal insults or to harass individuals or businesses;
 - Share negative or inflammatory content to incite continuous arguments or negative debates;
 - Spread offensive content or images that are not suitable for all ages, including racial or religious slurs, sexually offensive material, information related to illegal activities, or defamatory, indecent, misleading or unlawful content;
 - Gambling or wagering for monetary gain;
 - Solicit illegal funds from businesses or individuals;
 - Share copyrighted images, programs, music or other materials that they do not own the rights for (VPL, 2014);
 - View or distribute material that is fraudulent, harassing, sexually explicit, profane, obscene, intimidating, defamatory or unlawful (FSJPLA, 2009).

5.7 Table of Approval

Original Approval	
Date of Revision	
Scheduled Review	
Signature of Approval	

6.0 Social Media and FSJ Public Library Website Policy and Procedures

6.1 Purpose and Statements

The Fort St John Public Library Association (FSJPLA) utilizes social media and their website to promote the library, educate library users on library resources and activities and to allow members to access digital information when it is convenient for them. These tools are meant to benefit the FSJPLA and its members and this policy and procedures is created to allow all individuals and parties to understand how the tools are to be used.

6.2 Application

This Policy and Procedure applies to library staff, volunteers and Board Trustees as well as individuals accessing the FSJPLA webpage and social media sites.

6.3 Authority

Revisions to this policy and procedures can be authorized by the FSJPLA Director of Library Services.

6.4 Legislation of Interest

Canadian Personal Information Protection and Electronic Documents Act

Canadian Charter of Rights and Freedoms

BC Freedom of Information and Protection of Privacy

6.5 Policies and Procedures for Social Media and FSJPLA Website

6.5.1 Fort St John Public Library Association Website

- The FSJPLA will maintain a Website Privacy Policy available to all users of the site;
- Users have the responsibility to review the Website Privacy Policy and have implied consent if using the FSJPLA website;
- The FSJPLA may collect information around what individual FSJPLA webpages are accessed and the length of the visit per page;
- If the FSJPLA Website user has accessed their webpage via another webpage, this linkage may be tracked;
- The FSJPLA does not save personal information from donations made via their website;
 - Donations are made through CanadaHelps.org and anonymity protocols will be conducted as per the CanadaHelps guidelines.
- Upon registration for membership, information collected through the FSJPLA website is: Name, address, phone number, email address and for junior memberships parent/guardian name and contact information;
- FSJPLA policies and procedures do not apply to third party websites;
- FSJPLA does not have the ability to access a user's account history or password;
- FSJPLA account holders can request their account password get reset by:
 - Accessing the "Forgot your Password" link on the log-in page of the FSJPLA website and completing the requested information;

- Or, calling or going into the library with their library card and having a library staff member reset the password (France, 2015).

6.5.2 Fort St John Public Library Association Social Media Use

- The FSJPLA maintains information about the library on a number of social media mediums, including: Facebook, Instagram, Tumblr, Twitter, and Google+;
- Members of the public are encouraged to participate on the FSJPLA social medium forums;
- FSJPLA encourages freedom of expression and will not filter comments unless they are profane, solicitation, defamatory or unlawful or misalign with library mission, vision and values or policies;
- The Director of Library Services and the Program Coordinator are responsible for the maintenance and monitoring of the FSJPLA social media sites;
- Principles of integrity, respect, and honesty should be applied to all those posting on FSJPLA social media forums (HireRabbit, 2015);
- FSJPLA social media users must respect privacy and copyright laws;
- The FSJPLA is not responsible for third party postings or information shared through their social media forums.

6.6 Table of Approval

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7.0 Access to Information and Protection of Privacy Policy and Procedures

7.1 Purpose and Statements

The Fort St John Public Library Association (FSJPLA) strives to create an environment where its patrons are confident they can explore different ideas and views while maintaining a respectful level of privacy. In order to best serve its members and patrons, the FSJPLA may be required to collect personal information. This policy strives to inform patrons of the FSJPLA's use, decisions related to and disbursement of private information. This policy outlines the responsibilities of the FSJPLA and those utilizing the library in order to maintain a comfortable environment in which its patrons can freely access knowledge, learn and grow.

7.2 Application

This policy applies to all library patrons, employees, volunteers and Board Trustees.

7.3 Legislation of Interest

Canadian Personal Information Protection and Electronic Documents Act
BC Freedom of Information and Protection of Privacy Act

7.4 Authority

Revisions to this policy and procedures can be authorized by the FSJPLA Board of Trustees

7.5 Policies and Procedures for Access to Information and Protection of Privacy

- The Library utilizes the same definitions of as the Freedom of Information and Protection of Privacy Act (BC);
- The FSJPLA encourages parties seeking information that is not publicly available to contact the Director of Library Services. Prior to contacting the Director, individuals are encouraged to review the Guide to the Freedom of Information and Protection of Privacy Act (BC);
- While complying with law and regulations, the FSJPLA will make every reasonable effort to ensure that information about its users and their use of library materials, services and programs remains confidential [TPL, 2014a];
- The FSJPLA will limit the collection of personal information to what is necessary for the proper administration of the library, its services and programs;
- If requested, the FSJPLA will identify the reason for collecting information to the individual;
- The FSJPLA will not disclose personal information relating to a member or patron to any third party not under contract with the library, without consent. Children under 12 years of age may have personal information provided to a parent or guardian without the child's consent;
- If required, the FSJPLA may release relevant personal information to a third party who is acting on behalf of, or providing service to the library, such as a fee collector. The third party is obligated to adhere to all FSJPLA Policy and Procedures (TPL, 2014a);
- In the case of an emergency FSJPLA staff are authorized to access a patron's record and share essential information with care providers as well as contacting next of kin (WVML, 2014);
- The FSJPLA will never sell or release private information to solicitors;

- Library members are able to set their myFSJPL profile to keep a list of books borrowed. FSJPLA staff cannot enable this option for members and cannot view the contents of the record (France, 2015);
- For statistical purposes the FSJPLA tracks information pertaining to enquiries. The FSJPLA does not retain personal information, content of the questions or names of the patrons once the matter is resolved;
- The FSJPLA may track the number of questions over a time period, whether the patron is an adult or juvenile, the method used to ask the question (online, phone, or in person) (France, 2015);
- The FSJPLA will collect data based on a patron’s location in the Peace River Regional District and report this information to the District and municipality;
- The FSJPLA may conduct surveys to better serve its patrons. These surveys will be conducted online or in person. The FSJPLA will never require a respondent to provide their name. These surveys will be optional and are designed to collect information such as age, demographic, location and the extent of library use over a given time frame, along with seek suggestions for improved service (France, 2015);
- The FSJPLA does not disclose personal information related to staff without consent from the individual staff member, including reference checks and confirmation of employment (TPL, 2014a).

7.6 Table of Approval

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8.0 Safety Policy and Procedures

8.1 Purpose and Statements

The Fort St John Public Library Association (FSJPLA) values its employees, volunteers and patrons. In order to ensure maximum enjoyment for all those using library resources the FSJPLA has developed the Safety Policy and Procedures to complement existing statutory requirements.

8.2 Application

This policy and procedure applies to all Board Trustees, employees, contractors, volunteers and patrons of the FSJPLA.

8.3 Authority

Revisions to this document can be authorized by the FSJPLA Board of Trustees.

8.4 Legislation of Interest

[BC Workers Compensation Act](#)

[BC Occupational Health and Safety Regulation](#)

[BC Safety Standards Act](#)

[Canada Workplace Hazardous Materials Information System \(WHIMIS\)](#)

[Criminal Code of Canada](#)

8.5 Policies and Procedures for Safety

8.5.1 Employee Responsibilities on Safety

- To identify workplace safety issues and present them in a timely manner to their supervisor;
- To report workplace incidents, hazards or injuries immediately;
- To ensure the safety of patrons and fellow staff while on-site of the FSJPLA or while participating in FSJPLA related functions;
- To know the location of first aid supplies, emergency exits and evacuation procedures;
- To participate in fire drills and other emergency evacuation procedures (Otonabee – South Monaghan Public Library, 2015);
- To remove themselves from dangerous or unsafe situations and immediately contact the responsible authority to assist;
- To conduct themselves in a respectful manner, keeping the FSJPLA safe from bullying and harassment.

8.5.2 Employer Responsibilities for Safety

- To provide adequate resources and training to ensure a respectful safe workplace;

- To conduct incident investigations and report out to employees and the Board in a timely manner;
- To design and implement changes where an investigation has indicated the need;
- Focus on injury prevention;
- When required, report workplace incidents to the appropriate authorities;
- Schedule fire drills and other emergency evacuation practices;
- To schedule a minimum of three employees to be on FSJPLA premises during operating hours;
- To fully consider all employee reports of safety issues;
- Reporting out on safety issues to the Board of Trustees; via the Director of Library Services.

8.5.3 Safe Conduct on Library Premises

Individuals on library premises must not:

- Endanger the personal safety of themselves or others;
- Intentionally damage or destroy library property;
- Create a safety hazard while on site;
- Harass or threaten other individuals present (University of Victoria, 2015).

8.5.4 Safety Protocols on Library Premises

- FSJPLA employees are not responsible for North Peace Cultural Centre Security (NPCC);
- If available, FSJPLA should be aware of NPCC security and safety policies as they pertain to the Library, its staff and patrons;
- The Director of Library Services is responsible to provide direction at their discretion during emergencies. Should the Director not be on premises, the designated employee in charge fulfills the Director's role;
- Incident reports should be filled out for non-threatening and threatening emergencies;
 - Threatening emergencies require immediate action with incident reports filed within twenty four hours;
 - Non-threatening emergencies should be tended to and reports filed within forty eight hours.
- Incidents or issues with the building should be reported immediately to the NPCC Director/Manager or the Head of Maintenance (France, 2015);
- Patrons conducting themselves in a manner that is dangerous to themselves or other individuals shall be asked to leave the library by the staff member in charge.
 - Should the individual refuse to leave or become threatening, library staff are to contact NPCC Security;
 - If there is an immediate threat of harm or danger, staff are to contact Emergency Services by calling 911 and report the incident as soon as possible to the Director of Library Services or their designate.
- The Director or their designate of the FSJPLA has the discretion to ask that a patron remove themselves from the premises and determine if/when the patron is welcome to return.
 - The Director should have a second staff member present when dealing with patron;

- o The Director must clearly state why the patron is being asked to leave;
- o The Director will indicate the duration of the expulsion from the library;
 - Expulsions exceeding one week are made at the discretion of the Director of Library Services or their designate.
- o Should the patron disagree with the expulsion, they can contact the Director of Library Services for reconsideration.

8.5.4 Hazardous Materials and Objects

- It is acknowledged that all hazardous materials and objects cannot be removed from FSJPLA premises;
- Individuals must make best efforts to be aware of and minimize risk of hazardous materials and limit chances of individual interaction with them;
- WHIMIS principles will be applied and Material Safety Data Sheets (MSDS) posted when necessary;
- If a suspicious package or object is identified, staff must contact NPCC Security and the RCMP. Staff must exercise caution and follow evacuation procedures during such instance.

8.5.5 Evacuation of Library Premises

- If an evacuation of the Library is required, patrons are requested to follow staff direction;
- Staff will direct patrons to the nearest appropriate exit;
- Staff and patrons can view evacuation maps posted in the library;
- All on premises are requested to gather at the muster point on the south corner of the parking lot by the “Dancing Couple” art installation (France, 2015);
- To ensure all are accounted for no one is to leave the muster station until it is indicated they are okay to do so;
- If safe, the Director of Library Services or their designate will sweep the library to ensure it is evacuated.

8.5.6 Administration of First Aid

- Patrons are responsible for their own safety while on FSJPLA premises;
- FSJPLA staff have a First Aid kit available;
- If a First Aid incident occurs, staff will fill out an incident form to be signed off by Director of Library Services.

8.5.7 Posting of Safety Materials

- Materials required for posting are:
 - o Evacuation procedures;
 - o The Safety Policy and Procedure.
- Locations of postings are:
 - o Every exit;

- o Front desk;
 - o Staff room.
- Staff will have a list of emergency contacts available to them in the Internal Employee Policy.

8.6 Table of Approval

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9.0 Accessibility and Inclusion Policy and Procedures

9.1 Purpose and Statements

The Fort St John Public Library Association (FSJPLA) has adopted the Canadian Library Association Statement on Diversity and Inclusion. The Accessibility and Inclusion Policy and Procedures are created to further clarify the FSJPLA position and support it in meeting its goal to provide excellent customer service to all patrons, including providing equal access to library programs, services, materials and facilities. The FSJPLA has and will continue to create avenues to identify community needs and provide programs and services to meet the needs (FSJPLA, 2009).

9.2 Application

This policy applies to all library patrons, employees, volunteers and Board Trustees.

9.3 Authority

Revisions to this policy can be authorized by the Fort St John Public Library Association Director of Library Services.

9.4 Legislation of Interest

Canadian Charter of Rights and Freedoms
BC Human Rights Code

9.5 Policies and Procedures for Accessibility and Inclusion

9.5.1 Patrons with Disabilities and Barriers

- The FSJPLA acknowledges that an individual's disability may be mental or physical and may not always be outwardly identifiable;
- Individuals with barriers are those that do not have a disability but find limitations in the environment they are currently in, such as a language barrier;
- The FSJPLA will make reasonable efforts to establish, implement and monitor policies, services and practices to balance and integrate the needs of all patrons, including those with disabilities and barriers (TPL 2014b);
- Where the FSJPLA is unable to meet an individual's needs, they may partner with other agencies and institutions to provide programs and services (FSJPLA, 2009);
- Library staff, volunteers, Board Trustees and library patrons are all required to treat individuals with mutual respect and dignity;
- Within its capacity, the FSJPLA will strive to provide an atmosphere that creates independence amongst all users (TPL, 2014b);
- Staff, volunteers and Board Trustees will understand the Legislation relevant to this policy and procedures and the obligations of the FSJPLA within them. Needs for staff training will be identified to the Director of Library Services for consideration and implementation;
- The FSJPLA encourages patrons to identify their specific needs in order for the library to make reasonable efforts to accommodate them;

- Needs may be identified to any staff member. Staff members will enlist help from the Director of Library Services if they are unable to accommodate the request(s);
- The Director will identify reasonable requests that they are unable to accommodate to the Board of Trustees or partner libraries for consideration and solution development.
- The FSJPLA recognizes that equitable access sometimes precludes separate or specialized services. These services will be offered to with dignity and full participation of persons with disabilities (TPL, 2014b);
- Service animals are welcome in the Library. Patrons may be required to show documentation confirming the animal is a service animal. Without proper documentation the animal may be requested to be removed from the library. Service animals are expected to be supervised by their owners and kept in control at all times (Innisfil Public Library [IPL], 2014);
- The library welcomes persons with disabilities and their support people. In most cases, the library will not charge support staff to attend programs and services. Advance warning will be provided in the rare case of a fee (TPL, 2014b);
- A fee for support persons will only be considered if the FSJPLA is required to fund the second person, such as the case of a third party program being hosted by the library;
- When discussing confidential information with a patron, the patron will be provided the option to include their support person in the conversation (TPL, 2014b);
- Persons with disabilities and barriers may use personal assistive devices while accessing the library, unless there is a health a safety risk (TPL, 2014b);
- When procuring goods, services and facilities the library will consider the needs of all patrons, including those with disabilities (TPL, 2014b);
- The FSJPLA will make best efforts to ensure facilities accommodate those with physical disabilities, such as having wheelchair ramps and automatic doors;
- The FSJPLA will make available devices for print disabled persons, including Daisy Readers (France, 2015);
- The FSJPLA will make Daisy Devices available to individuals for extended periods as long as there is a sufficient supply for all users;
- The FSJPLA will post information and resources for individuals with [Print Disabilities on their website](#). This will include access to [National Network for Equitable Library Services \(NNELS\)](#).

9.5.2 Library Diversity

- The FSJPLA encourages diversity in its staff, volunteers, patrons and Board Trustees. In order to achieve this, the library will not tolerate unjust or prejudicial treatment of different categories of people, including on the grounds of race, age or gender, during the hiring process, the recruitment of volunteers and Board Trustees or against any individual wishing to become a member of the library (Oxford, 2015);
- During planning and decision making processes, the FSJPLA will identify and consider all populations that may be patrons (VPL, 2010);
- The FSJPLA will seek to understand the various needs and diversity of its various patron groups (VPL, 2010);
- Where feasible, the library will place emphasis on communicating directly with the various patron groups during planning processes to identify the various interests, needs and unique protocols to be considered (VPL, 2010);
- The library may consider creating and acquiring cultural specific documents to assist staff and members. Patrons are free to express desires with all library staff without

discrimination. Final decision is made by the Director of Library Services based on feasibility and need.

9.6 Table of Approval

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10.0 Material Acquisitions and Disposal Policy and Procedures

10.1 Purpose and Statements

This policy and procedure is to support the Fort St John Public Library Association's (FSJPLA) Mission of providing a variety of information and support for lifelong learning in a welcoming, entertaining and safe environment. The FSJPLA strives to maintain a broad range of up to date materials, such as books, periodicals, newspapers, magazines, audio visuals, DVDs and compact discs. This policy guides the Library in the obtainment and disposal of these materials, while upholding the Canadian Library Association Position Statement on Intellectual Freedom.

10.2 Application

This Policy and Procedure applies to library staff, volunteers and Board Trustees.

10.3 Authority

Revisions to this document can be authorized by the FSJPLA Director of Library Services.

10.4 Legislation of Interest

Library Act

10.5 Policies and Procedures for Material Acquisitions and Disposals

10.5.1 Acquisitions

- The responsibility of the collection lies with the Director of Library Services, under the direction of the Board of Trustees (Seattle Public Library [SPL], 2002);
- The FSJPLA material collection will represent an unbiased and diverse source of information (SPL, 2002);
- The FSJPLA will utilize staff that have familiarity with the existing collection, awareness of the library user's needs and knowledge of current and future trends for informational materials that are suitable (TPL, 2007);
- "The library will not keep, acquire or purchase material that the Canadian Courts have found to be obscene, hate propaganda or seditious" (TPL, 2007);
- The FSJPLA will not exclude materials from its selection based on the fact that they may come into the possession of a child (TPL, 2007);
- The FSJPLA will not exclude materials selection based on the author's race, ancestry, citizenship, age, criminal record, sexual orientation, disability, political or religious views or other discriminatory factors (TPL, 2007);
- The FSJPLA will maintain its responsibility to provide public information through written word and therefore not accept censorship of books, urged or practiced by volunteer of arbiters of morals or political opinion (FSJPLA, 2009);

- FSJPLA will consider a variety of factors, including:
 - Demand for the material;
 - Budgetary considerations and price of material;
 - How the material will complement the existing collection;
 - Suitability of the material for its intended audience;
 - Assessments from critics, reviewers and the public;
 - Need for the material into the future (TPL, 2007);
 - Information, needs and recreational interests of members (FSJPLA, 2009);
 - A full view of current interests, issues or problems on a local, national and international level (FSJPLA, 2009);
 - Publication date and relevancy to current issues and interests.
- Selection of materials for the FSJPLA collection does not constitute an endorsement by the library or its staff, volunteers or Board Trustees for either the content or viewpoint expressed (TPL, 2007);
- The FSJPLA will strive to carry materials in an array of languages for all ages as well as materials for English as a Second Language members;
- The FSJPLA will utilize information available from organizations such as S.U.C.C.E.S.S regarding the languages in the service area;
- The FSJPLA strives to carry Canadian content and authors;
- Local history collections will be made available at the FSJPLA;
- The FSJPLA will consider regional interests when determining collection selection, such as materials specific to northern living and the energy sector;
- The FSJPLA will not normally purchase textbooks.

10.5.2 Withdrawal of Materials

- The policies relating to the acquisition of materials also apply to withdrawals;
- Materials may be withdrawn from the library based on their condition, their accuracy and currency, demand by members and context within the library collection (TPL, 2007);
- The FSJPLA will temporarily remove materials from its collection if they are subject to libel action until such time that it is resolved. Depending on the outcome the item will either be returned to the collection or permanently removed;
- The FSJPLA follows CREW Guidelines to help determine the withdrawal selection (TPL, 2007 and France, 2015);
- The FSJPLA provides opportunities for suggestions on the appropriateness of its materials. Individuals may provide feedback to the FSJPLA through the Contact Email on the [FSJPL website](#) or by telephoning the Director of Library Services (WVML, 2014).

10.5.3 Material Consideration by the FSJPLA

- If an individual or groups would like their materials to be considered by the FSJPLA for their collection they must do the following:

- o Send materials or a written request about the materials to the Director of Library Services;
- o Include: the title of work, name of the author, publisher, cost, etc., a summary of the work, who the intended audience is, information about the illustrator (if applicable), where the material can be ordered and why it would be beneficial to the library’s collection (VPL, 2015);
- o It is beneficial to include reviews or media coverage information related to the materials.
- All materials submitted to the FJSPLA will remain the property of the library unless prior arrangements are made;
- Patrons will be provided opportunities to suggest a purchase on the FSJPLA website;
- The FSJPLA purchases digital packages through the BC Library Cooperative and does not control the content. All content concerns relating to the digital materials should be directed through the appropriate digital source.

10.6 Table of Approval

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11.0 Financial Policy and Procedures

11.1 Purpose and Statements

The Fort St John Library is a Library Association and therefore does not receive direct tax support and primarily operates on grants and fundraising. This Financial Policy and Procedures document was developed and implemented to support those working for and providing funding and donations to the FSJPLA to create a common understanding of the principles the Library has established to ensure a maximization of resources.

11.2 Application

This Policy and Procedure applies to FSJPLA staff, volunteers and Board Trustees.

11.3 Authority

Revisions to this document can be authorized by the FSJPLA Board of Trustees.

11.4 Legislation of Interest

BC Society Act

Canada Revenue Agency Acts

11.5 Policies and Procedures for Financial Activities

11.5.1 General Financial Practices

- The FSJPLA is accountable to its stakeholders, donors, funding agencies and patrons in providing confidence that the resources provided to the Association are used appropriately, ensuring that overhead and administration are minimized where possible in order to focus on maximum client services and programs as well as library materials (The Salvation Army [TSA], 2015);
- At no time will an FSJPLA employee, Board Trustee or volunteer utilize FSJPLA funds to provide themselves personal benefit;
- The FSJPLA will post its approved budget on their website.

11.5.2 Expense Claims

- Original receipts must be provided for all reimbursement claims except where amounts are on a per diem basis. If the receipt has been misplaced a written explanation of the amount, item purchased, cost, supplier and date must be provided to the Director of Library Services for consideration. The Director of Library Services must provide all of their expenses to the Board;
- Expense claims must be submitted within 30 days of the expense being incurred or prior to year-end (December 31) whichever is first;

- The library will not pay interest accrued on credit or lost on savings resulting from a work expense unless the FSJPLA takes an unreasonable length of time to reimburse an expense claim;
- Employees will receive funds for reimbursement within two weeks of an accepted claim;
- The FSJPLA reimburses employees, volunteers and Board Trustees for reasonable travel expenses incurred while on pre-approved library business;
- Travel reimbursement amounts are based on the amounts defined in the Collective Agreement for unionized employees;
- Childcare reimbursement will be conducted as per the Collective Agreement;
- Excluded employees and Board Trustees will be reimbursed at rates consistent with the Collective Agreement;
- All travel outside of the British Columbia or Alberta must be preapproved by the Board of Trustees;
- Accommodation choices should be booked factoring in total overall cost while providing the traveler a safe, clean place to stay. The price of accommodation should factor in transportation to and from the event/meeting, time to and from the event/meeting, transport required for meals and other variables;
- The maximum amount for accommodation is XXXXX
- The FSJPLA does not cover extra hotel expenses such as exercise facilities and pay-per-view;
- If the traveler stays in personal accommodations the FSJPLA will reimburse them at a rate of XXX??
- Prior to travel by vehicle, the estimated cost of the trip by personal vehicle must be calculated and compared with the cost of a rental vehicle, along with the cost of air travel (if available). The traveler must determine the most cost effective, safe option;
- The FSJPLA will pay the upgrade cost for winter tires for rental vehicles between October 1st and May 15th or when weather conditions require;
- Employees are able to have family members or friends travel with them on the basis that no extra cost will be incurred by the FSJPLA. The employee is responsible for extra expenses such as the cost of having extra persons in a hotel room;
- The FSJPLA will pay for laundry/dry cleaning services in cases where travel is longer than seven days, or the traveler had an unanticipated trip extension and it is required (TSA, 2015);
- The FSJPLA has a cell phone for individuals to utilize. No personal cell phone bills, hotel phone bills or other long distance charges will be reimbursed;
- The FSJPLA will reimburse travels for one regular size personal piece of luggage for airline travel along with the cost of luggage for FSJPLA related items;
- Tipping for services, such as taxis and restaurant service is acceptable. The maximum amount is set at 15%. In some cases the restaurant may have a set tip amount greater than this, for example group meals, it is acceptable to pay this amount as it is considered the cost of the meal (TSA, 2015);
- Unless physically unable, those traveling on FSJPLA business will not claim expenses for baggage handling or valet service. Claims must be reasonable and limited to necessity;
- The FSJPLA will not reimburse expenses relating to traffic violations, parking offences or other infractions;

- The FSJPLA will not reimburse alcohol expenses for travel or library events;

11.5.3 General Expenses

- The FSJPLA acknowledges the need to recognize employees from time to time. The recognition will be sufficient to demonstrate to the employee that the FSJPLA values them, while remaining cognizant that the library receives funding from donors. Recognition is at the discretion of the Director of Library Services or the Board and will be conducted within budgetary allowances. Examples of recognition include:
 - Retirement of a long term employee - \$100 per year of service up to \$1000;
 - The departure of an employee – \$50 per year of service up to \$250;
 - A long term service award - \$100 for five years, \$250 for 10 years;
 - The completion of a significant milestone, such as a Masters or Certificate - \$50?
 - Major Life Events such as weddings or births and deaths of close family members - \$125
- The FSJPLA will host an annual staff appreciation party at a rate no greater than \$50 per employee, volunteer or Board Trustee;
- Recognition amounts may be a taxable benefit and taxed accordingly as per the Canada Revenue Agency Requirements.

11.5.4 Contract Management

- The FSJPLA recognizes that creating contracts relating to services will be required;
- Contracts with an estimated total of over \$15,000 must be placed out for tender on a forum that is typical for the service type;
- Contracts under \$9,999 can be implemented by the Director of Library Services;
- Contracts over \$10,000 must be pre-approved by the Board of Trustees;
- Contracts do not have to be provided to the lowest tender;
 - the FSJPLA must provide a rationale for choosing otherwise;
- If it is known that there is only one potential contractor with the specific skills to complete the task, or the FSJPLA does not have time for a tender process a contract can be put in place as long as a rationale is documented.

11.5.5 Building and Hardware Acquisitions and Maintenance

- The FSJPLA must balance operating costs, including building acquisitions and maintenance in a manner that is appropriate to library funds, library use and in line with other libraries or not for profit agencies in the Peace Region or similar area;
- The FSJPLA recognizes that expenses in the Peace Region, such as trades work, building leases and library hardware may be more costly than other regions. The FSJPLA will strive to balance these expenses while maintaining a clean, well run and efficient library;
- For large purchases (over \$20,000) the FSJPLA will analyze at least three different scenarios, including the costs of renting and duration of use and present to the Board of Trustees for decision;

- When acquiring building space, the FSJPLA will consider approximate:
 - Moving costs;
 - Costs to reconfigure the space;
 - Length of time the space will suit the library’s needs;
 - Cost of new equipment required for the space;
 - Management fees;
 - Utilities;
 - Insurance costs;
 - Security costs;
 - Amortization and interest costs if looking to purchase;
- When undergoing floor plan or library expansion the FSJPLA will strive to consider reducing expenses over the longer term, accounting for anticipated growth or reduction in patrons and members.

11.5.6 Library Reserve Funds

- It is recognized that with the FSJPLA funding model that reserve funds will need to be allotted;
- The FSJPLA will have three months’ of operating costs in the Internally Restricted Reserve;
- The Board, along with the FSJPLA year-end accountant will approve deposits and withdrawals of funds into and from Internally Restricted Reserve (France, 2015).

11.6 Table of Approval

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12.0 Sponsorship and Fundraising Policy and Procedures

12.1 Purpose and Statements

The Fort St John Public Library is a library association, relying on funding from sponsorship arrangements, grants and donations in order to provide the community adequate library materials, services and programs. Revenue generation is an area of significant focus for the FSJPLA in order to provide the most suitable library facility for the public and staff and security for long term library operations. While raising funds is important to the library, it is equally important to have a transparent framework for the acceptance of gifts and donated materials.

12.2 Application

This policy applies to all library employees, volunteers and Board Trustees and all private persons and businesses providing donations and entering into financial agreements with the Fort St. John Public Library Association.

12.3 Authority

Revisions to this policy can be authorized by the FSJPLA Board of Trustees.

12.4 Legislation of Interest

Canada Revenue Agency Acts and Regulations

Canada's Anti-Spam Legislation

BC Freedom of Information and Protection of Privacy Act

BC Gaming and Licensing

12.5 Policies and Procedures for Sponsorships and Fundraising

12.5.1 General Practices Relating to Sponsorships and Fundraising

- The FSJPLA will comply with its mandate, strategic plan and all policies and procedures when applying this policy;
- Individuals and businesses are responsible for ensuring they understand and are in agreement with taxation laws and regulations relating to donations, sponsorships and advertising. The FSJPLA will not provide advice or be held liable on such issues.
- Fundraising and gift acceptance activities will be conducted with respect for donors and supporters and will be guided by the library's strategic plan.

12.5.2 Sponsorships

- The FSJPLA has adopted the Canadian Library Association Position Statement on Corporate Sponsorship Agreement in Libraries;
- A sponsorship is an agreement between a business or individual and the library in which both parties benefit (TPL, 2014c);
- A sponsorship can be in the form of cash, goods or services directed at the FSJPLA;

- The FSJPLA will not accept sponsorship funding which is contradictory to its service role, mission, vision and values or does not meet the library or its patrons' best interests (TPL, 2014c);
- The FSJPLA reserves the right to accept or refuse any sponsorship messaging and withholds the right to maintain or withdraw the library/business relationship without compensation at the discretion of the Director of Library Services;
- The acceptance of a sponsorship message is not an indication of promotion or endorsement by the library;
- The FSJPLA is not liable for financial retribution caused by any sponsorship. All financial responsibilities are maintained by the sponsor. Should the library require legal representation due to a sponsorship, the sponsor may be held responsible for all associated financial implications;
- The FSJPLA will not accept sponsorship material that its Director considers to be promoting discrimination, stereotypes, socially unacceptable behavior, violence, obscene or profane language, to be offensive, or to contradict FSJPLA mandates or policies;
- Advertising/sponsorship materials must be suitable for all audiences and clearly indicate the business or sponsor;
- A business entering into a sponsorship/advertising agreement with the FSJPLA will not have any influence over the library's service plan, programs or policies and procedures;
- Organizations wishing to enter a sponsorship/advertising relationship with the FSJPLA will require a separate written contract with the FSJPLA that complies with this policy (TPL, 2014c);
- The FSJPLA wishes to recognize donors and sponsors:
 - For donations \$499 and under, the FSJPLA will acknowledge with a letter to the contributor;
 - For donations \$500 and over, the FSJPLA will acknowledge with one or more of the following: a posting on their website, mention in social media or posted for display in the library (France, 2015).
- The FSJPLA will not post information regarding anonymous donations.
- If a sponsorship is provided for a specific program that the FSJPLA has requested funds or donations for, they will be used explicitly for the program. All other funds are placed into the FSJPLA's general funds;
- The FSJPLA may put sponsorship of a program out to tender and determine by application from potential sponsors who will be the primary and subsequent sponsors and how recognition is provided;
- Corporations may be solicited by FSJPLA staff and volunteers for sponsorship requests. The FSJPLA will abide by all applicable legislation when requesting sponsorship, including Canada's Anti-Spam Legislation;
- Potential sponsors, or sponsor renewals should contact the Director of Library Services for sponsorship information;
- Sponsorship funds will be accounted for in the FSJPLA accounting software as donations.

12.5.3 Donated Materials and Gifts

- A donation or gift refers to a contribution that is given voluntarily to the library, for which a Charitable Tax Credit may be issued and does not provide a potential monetary gain for the donator (Innisfil Public Library [IPL], 2014a);
- Charitable Tax Receipts will follow the Canadian Revenue Agency Guidelines;

- Gifts and donations can include: money, books and print materials, audio visual materials, art and photography, equipment, in-kind gifts and services, property, willed donations, bequests or endowments [IPL, 2014];
- The library does not accept: magazines, textbooks, computer books, VHS, unlicensed or counterfeit copies, materials in poor condition, or other items as determined by library staff;
- Books and other materials will be gratefully accepted providing they meet FSJPLA Policy and Procedures;
- Donated materials must be presented to library staff for acceptance;
- Staff and volunteers will process donated books, DVDs and audio CDs;
- All other donations and gifts are processed by the Director of Library Services.
- Gifts of money, and/ or stocks and bonds will be presented to the Director of Library Services and accepted if conditions attached thereto are acceptable to the Board of Trustees (FSJPLA, 2009);
- Unless specified prior to transfer, all gifts become the property of the FSJPLA to be utilized in a manner they see as appropriate;
- The FSJPLA has no obligation to inform the donor of how the gift or donation was utilized;
- The library reserves the right to sell donated materials during fundraising initiatives.

12.5.4 Participation in Lotteries and Community Fundraisers

- The FSJPLA may participate in third party fundraisers or conduct their own fundraisers;
- Third party fundraisers retain the responsibility for adhering to all applicable legislation;
 - o Should the FSJPLA become aware of third party non-compliance they will immediately desist participating in the fundraising initiative.
- The FSJPLA will obtain the necessary permits and licenses required for its own fundraisers and lotteries.

12.6 Table of Approval

Original Approval	
Date of Revision	
Scheduled Review	
Signature of Approval	

Appendix B – Draft Policy and Procedure Template

TITLE Policy and Procedures

Purpose and Statements:

Application:

This Policy and Procedure applies to

Authority:

Revisions to this document can be authorized by the FSJPLA Board as defined by the Library Act (BC)

Legislation of Interest:

Policies and Procedures:

Table of Approval:

Original Approval	
Date of Revision	
Scheduled Review	
Signature of Approval	