

DRAFT Library Operations Policy

Adopted by the Board of Directors on XXXX

Background and Purpose

1. The Law Society of Ontario's By-Law 13 ("By-Law 13") charges LiRN with establishing guidelines and standards for the organization and operation of the Ontario county and district law library system.
2. Each Library funded by LiRN is required to be operated by its county and district law association ("Law Association") in accordance with the guidelines and standards established by LiRN pursuant to By-Law 13.
3. LiRN provides financial support by transferring grants to Law Associations to operate courthouse law libraries ("Libraries") in accordance with the guidelines and standards LiRN has established.
4. By-Law 13 further requires that Libraries give access to library services and programs to:
 - a. Every person licensed to practise law in Ontario as a barrister and solicitor, regardless of whether the person is also a member of an Association;
 - b. Judges of Ontario courts;
 - c. Ontario justices of the peace; and
 - d. Members of boards, commissions or other tribunals established or provided for under Acts of Parliament or the Legislature in Ontario.
5. The [Grant Administration Policy](#), adopted by LiRN's Board of Directors on September 3, 2021, re-affirms that Law Associations must identify and separate Law Association operations from Library operations and account for LiRN grants as restricted for Library purposes.
6. The Amended and Restated Unanimous Shareholder Agreement dated November 29, 2019, states that LiRN may conduct an audit of expenditures related to the Law Association's grant at the direction of the LSO.

7. LiRN seeks to provide equitable access to core materials and services for all eligible individuals.
8. The purpose of this Policy is to:
 - a. Define the Core Library Services and Library Management Responsibilities that are required to be offered and performed by Libraries.
 - b. Affirm that Law Associations may offer additional library services.
 - c. Recognize that, as the employer, Law Associations may assign responsibilities outside of Library operations.
 - d. Confirm that the LiRN grant is intended to cover staff salaries only to the extent that assigned activities are related to Library operations.
 - e. Acknowledge that many Law Associations offer services and have need for staff to execute responsibilities outside of those required to operate the Library and that clear distinctions between association and library work are not always possible; and
 - f. Provide guidelines to determine whether a Law Association should contribute to a Library staff member's salary.

Definitions

9. **Additional Library Services** includes services directly related to Library operation outside of those identified as Core Library Services, and may include:
 - a. Current awareness;
 - b. Library website pages development and maintenance;
 - c. Library social media management;
 - d. Library training;
 - e. Events and meetings related to library activities; and
 - f. Other services that rely on the specialized information retrieval and dissemination skills of library staff.

10. **Association Activities** include work that is related to non-library aspects of the Association, such as:

- a. Organizing Law Association events not related to the library, including social and mentoring events;
- b. Developing and implementing Association policies unrelated to the library; and
- c. Supporting the Law Association's Board of Directors and/or its committees on the non-Library aspects of the Law Association.

Other work, including duties related to Original CPDs and Replay CPDs, may be classified as Association Activities using the factors outlined in this policy.

11. **Core Library Services** are library services that are required to be offered to users in each Library:

- a. Research and reference services;
- b. Instruction and support in using library resources, including print, electronic, and equipment;
- c. Borrowing privileges;
- d. Access to the collection (print and electronic) during open and staffed hours; and
- e. Access to additional materials through inter-library loans within the network.

12. **Library Management Responsibilities** are the activities required to effectively operate the Library, including:

- a. Collection Management;
- b. Collection Maintenance;
- c. Cataloguing;
- d. Financial Administration;
- e. Managing employees and executing HR responsibilities;
- f. Library Administrative Tasks;

- g. Library Promotion; and
- h. Working with and reporting to the Law Association's Board of Directors and/or its committees on Library activities.

13. **Original CPDs** are formal, instruction-based continuing professional development sessions created by a Law Association that present substantive and/or professionalism content. Creating Original CPD often includes, without limitation, the activities listed below:

- a. Developing the topic(s);
- b. Securing and managing speakers, including gathering materials and slide decks;
- c. Applying for accreditation if applicable;
- d. Budgeting for the event, including securing sponsorships if applicable;
- e. Processing registration including payments;
- f. Marketing and promotion;
- g. Logistics such as booking the venue, arranging AV, ordering catering and managing registration;
- h. Day-of coordination, such as staffing the check-in desk and technical support; and
- i. Post-conference activities such as collecting feedback and preparing reports on the conference.

14. **Replay CPDs** are recorded continuing professional development events that are developed by external organizations such as the Law Society of Ontario and that the Law Association has arranged to have replayed for a group. Offering a Replay CPD often includes, without limitation, the activities listed below:

- a. Marketing and promotion;
- b. Processing registration including payments;
- c. Logistics such as booking a, arranging AV, ordering catering and managing registration; and

- d. Day-of coordination, such as staffing the check-in desk and technical support.

Minimum Standards

- 15. Law Associations must make all Core Library Services available to library users.
- 16. Law Associations may make Additional Library Services available to library users.
- 17. Law Associations must execute all Library Management Responsibilities in operating the Library.

Access to Services

- 18. Library services must be available to all entitled to access under By-Law 13 with the following exceptions, which may be restricted to Law Association members only in the Law Association's discretion:
 - a. Borrowing privileges;
 - b. After-hours collection access; and
 - c. Additional Library Services.
- 19. Section 18 does not prevent Law Associations from restricting or revoking access to the Library for any individual whose behavior is deemed disruptive, inappropriate, or contrary to the respectful and productive use of the library space. This includes, but is not limited to, conduct that interferes with the rights of others to study or work, violates library rules, or poses a safety or security concern. Decisions regarding access restrictions may be made at the discretion of the Law Association and may be temporary or permanent depending on the nature and severity of the conduct.

Use of LiRN Grant for Library Staff Salaries

- 20. LiRN grants are designated as restricted funds and must be exclusively used to support library operations, including Core Library Services, Library Management Responsibilities, and Additional Library Services.

21. As the employer, Law Associations are responsible for assigning tasks and duties to Library staff and may assign work connected to Association Activities.
22. Law Associations are responsible for ensuring that:
- a. All Core Library Services, Additional Library Services, and Library Management Responsibilities, are delivered in full and to a professional standard.
 - b. Any time allocated to Association Activities is managed with professional discretion, ensuring continued and effective operation of the Library.
23. Where duties related to Association Activities form part of a staff member's role, the Law Association will contribute appropriately to that staff member's salary. While some Library staff time may reasonably be allocated to Association Activities without requiring a contribution, the Law Association is expected to contribute when such duties represent a meaningful portion of the staff member's responsibilities.

Determining Association Activities

24. LiRN recognizes that certain staff duties may encompass both library-related and association-related elements, making clear distinctions challenging. Examples include the development and delivery of Original CPD and Replay CPD programs.
25. Law Associations will determine whether the duties it assigns to Library staff are Association Activities.
26. To support consistent and fair decision-making regarding salary contributions, the following guiding factors will be considered when evaluating whether an activity falls within the scope of library operations:
- a. Does the work rely on the specialized skills in information retrieval and dissemination generally possessed by librarians and library staff?
 - b. Does the work fall within LiRN's mandate as set out in By-Law 13, the Unanimous Shareholder's agreement, and LiRN's Strategic Plan?

- c. Is the work necessary to provide Core or Additional Library Services or Library Management Responsibilities?

27. Law Associations will maintain and provide on request transparent records to support funding integrity.

Inability to Provide Services or Execute Responsibilities

28. LiRN acknowledges that many factors affect a Law Association's ability to provide services or execute responsibilities. Where a Law Association is unable to provide the core services or fulfill management responsibilities, LiRN will work with the Association to address the issue. Inability to meet requirements may be considered when setting funding.

Audit

29. If concerns about a Law Association's use of the LiRN grant arise and cannot be resolved, LiRN may conduct an audit at the direction of the Law Society of Ontario, pursuant to the Unanimous Shareholder Agreement.