Recommended Policies Checklist
From the Handbook for Library Trustees of New York State, 2018 Edition

External
Circulation
☐ Customer Service
☐ Patron Confidentiality
  o Law Enforcement Inquiry
☐ Lending Rules
  o Non-Resident Borrowing

Collection
☐ Collection Development
  o Weeding
☐ Censorship:
  o Challenge of Library Materials
  o Freedom to Read (ALA)
  o Freedom to View (ALA)
☐ Copier/Copyright
☐ Local History

Public Space & Safety
☐ Accessibility/ADA Statement
☐ Exhibit/Posting
☐ Incident/Report Form
☐ Meeting Space/Equipment
☐ Patron Behavior/Code of Conduct
☐ Patron Complaints
☐ Programming
☐ Tutoring
☐ Unattended Children
☐ Vulnerable Adults

Internal:
Board
☐ Code of Ethics/Conduct
☐ Conflict of Interest
☐ Continuing Education
☐ Meeting Procedures
  o Public Expression
☐ Removal of a Trustee

Administrative
☐ Business Continuity Plan
☐ Environmental
☐ Inclement Weather/Closing
☐ Public Access to Records (FOIL)
☐ Public Relations (including Social Media)
☐ Records Retention

Financial Controls
☐ Audit/Review Schedule
☐ Claims Audit Process
☐ Credit Card
☐ Disposition of Surplus Property
☐ Friends Group Memo of Understanding
☐ Fund Balance & Reserve Funds
☐ Fundraising/Gift
☐ Investments
☐ Inventory/Fixed Assets
☐ Online Banking & Wire Transfers
☐ Petty Cash
☐ Purchasing/Procurement
☐ Travel & Conference

Technology
☐ Library Equipment Usage:
  o Computers
  o Printers
  o Devices
  o 3D Printer
☐ Internet Use
 Personnel
☐ Attendance/Leave
☐ Code of Conduct
☐ Computer/Internet/Email/Social Media
☐ Continuing Education
☐ Discipline/Termination
☐ Equal Employment Opportunity
☐ Evaluation Procedure
☐ Grievance Procedure
☐ Harassment
☐ Sexual Harassment Prevention*
☐ Jury Duty
☐ Nepotism
☐ Orientation
☐ Outside Employment
☐ Personnel Records Access
☐ Probationary Period
☐ Recruitment/Hiring
☐ Salary/Benefits
☐ Volunteers
☐ Whistleblower Protection

 Safety
☐ Emergency Plan
  ☐ Disaster Recovery
  ☐ Active Shooter Procedures
☐ Fire Safety
☐ Opioid Prevention Measures
☐ Workplace Safety

*new since the publication of the most recent Trustee Handbook