

Recommended Policies Checklist

From the Handbook for Library Trustees of New York State, 2023 Edition

External

Circulation

- ☐ Customer Service
 - Law Enforcement Inquiry
- ☐ Lending Rules/Procedures
 - Non-Resident Borrowing
- ☐ Patron Confidentiality

Collection

- ☐ Collection Development
 - Request for Reconsideration
 - Weeding
- ☐ Copier/Copyright
- ☐ Freedom to Read (ALA)
- ☐ Freedom to View (ALA)
- ☐ Library Bill of Rights
- ☐ Local History

Public Space

- ☐ Accessibility/ADA Statement
- ☐ Exhibit/Posting
 - Request for Reconsideration
- ☐ Incident Report Form & Procedures
- ☐ Meeting Space
- ☐ Patron Behavior/Code of Conduct
 - Request for Reconsideration
- ☐ Patron Complaints
- ☐ Programming
 - Request for Reconsideration
- ☐ Tutoring
- ☐ Unattended Children
- ☐ Vulnerable Adults

Technology

- ☐ Internet Use
- ☐ Library Equipment Usage
- ☐ Privacy
 - General Data Protection Regulation
- ☐ Social Media
- ☐ Website
- ☐ Wi-Fi Network Use

Internal

Board

- ☐ Code of Ethics/Conduct
- ☐ Conflict of Interest
 - Annual Disclosure Form
- ☐ Equity, Diversity & Inclusion
- ☐ Meeting Procedures
 - Public Comment
 - Videoconferencing
 - Protests
- ☐ Training Mandates
 - Trustee Education Requirements
 - Sexual Harassment Prevention Training
- ☐ Removal of Trustee

Administrative

- ☐ Inclement Weather Closing
- ☐ Records Retention
- ☐ Public Access to Records (FOIL)
- ☐ Public Relations
 - Crisis Communication Plan
- ☐ Sustainability

Financial Controls

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

Personnel

- ☐ Anti-Bullying
- ☐ Anti-Nepotism
- ☐ Attendance/Leave
- ☐ Code of Conduct
- ☐ Computer/Internet/Email/Social Media
- ☐ Conflict of Interest
- ☐ Continuing Education
- ☐ Discipline/Termination
- ☐ Equal Employment Opportunity
- ☐ Evaluation Procedure
- ☐ Grievance Procedure
- ☐ Introductory Period
- ☐ Jury Duty
- ☐ Orientation
- ☐ Outside Employment
- ☐ Personnel Records Access
- ☐ Recruitment/Hiring
- ☐ Salary/Benefits
- ☐ Telecommuting
- ☐ Volunteers
- ☐ Workplace Monitoring and Surveillance
- ☐ Whistleblower Protection

Safety

- ☐ Airborne Infections Disease Exposure Prevention Plan / Pandemic Response Plan
- ☐ Continuity of Operations Plan (COOP)
- ☐ Disaster Preparedness
- ☐ Emergency Action Plan
- ☐ Fire Safety
- ☐ Incident Action Plan
- ☐ Workplace Safety/Violence Prevention