

Recommended Policies Checklist

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

External

Circulation

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

Collection

- Collection Development
 - Weeding
- Censorship:
 - Challenge of Library Materials
 - Freedom to Read (ALA)
 - 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
- Smoking*
- Tutoring
- Unattended Children
- Vulnerable Adults

Technology

- Library Equipment Usage:
 - Computers
 - Printers
 - Devices
 - 3D Printer
- Internet Use

- Wireless Use
- Website
- General Data Protection Regulation

Internal:

Board

- Code of Ethics/Conduct
- Conflict of Interest
- Continuing Education
- Equity, Diversity & Inclusion Statement*
- Meeting Procedures
 - Public Expression
- Removal of a Trustee

Administrative

- Business Continuity Plan
- Sustainability* (replaces Environmental)
- Inclement Weather/Closing
- Health Emergency Plan*
- 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

*New since the publication of the most recent Trustee Handbook

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