Recommended Policies Checklist

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

External

Circulation
- ☐ Customer Service
- ☐ Patron Confidentiality
  - ○ Law Enforcement Inquiry
- ☐ Lending Rules (including Non-Resident Borrowing)

Collection
- ☐ Collection Development (including 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 & Procedure
- ☐ Meeting Space/Equipment
- ☐ Patron Behavior/Code of Conduct
- ☐ Patron Complaints
- ☐ Programming
- ☐ Tutoring
- ☐ Smoking
- ☐ Unattended Children
- ☐ Vulnerable Adults

Technology
- ☐ Cybersecurity*
- ☐ General Data Protection Regulation
- ☐ Library Equipment Usage (ex: computers, printers (including 3D printers), and other devices)
- ☐ Internet Use
- ☐ Wireless Use
- ☐ Website

Internal:

Board
- ☐ Code of Ethics/Conduct
- ☐ Conflict of Interest
- ☐ Continuing Education
- ☐ Equity, Diversity & Inclusion*
- ☐ Meeting Procedures (including public expression)
- ☐ Removal of a Trustee

Administrative
- ☐ Business Continuity Plan
- ☐ Inclement Weather/Closing
- ☐ Public Access to Records (Freedom of Information Law (FOIL))
- ☐ Public Relations (including social media)
- ☐ Records Retention
- ☐ Security System Access
- ☐ Sustainability*

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

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
- ☐ Telecommuting*
- ☐ Volunteers
- ☐ Workplace Monitoring and Surveillance*
- ☐ Whistleblower Protection

Safety

- ☐ Airborne Infectious Disease Exposure Prevention Plan*
- ☐ Disaster Recovery Plan/Continuity of Operations Plan (COOP)
- ☐ Emergency Action Plan
- ☐ Active Shooter Procedures
- ☐ Opioid Prevention Measures
- ☐ Workplace Safety

*new since the publication of the most recent Trustee Handbook