

SERVICE AND ADMINISTRATION POLICIES

BOARD OF TRUSTEES

CLEVELAND HEIGHTS-UNIVERSITY HEIGHTS PUBLIC LIBRARY

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## I.

## INTRODUCTION

These *Service and Administration Policies* have been prepared as guidelines to the operation of the library within the structure of its mission to the community (See *Bylaws*, II. OBJECTIVES). These Policies shall be subject to review. Procedural interpretation and implementation shall be at the discretion of the Director.

The library shall assemble, organize, preserve and make easily available library materials in accordance with the *Materials Evaluation and Selection Policy* adopted by this Board.

The staff will promote the resources and services of the library to encourage use by our customers.

To this end, the library staff shall be expected to know the resources of the Cleveland Heights-University Heights Public Library and the availability of resources of other libraries in the area.

The term library used throughout this Policy is meant to convey all Cleveland Heights-University Heights Libraries.

## II.

## COOPERATION FOR DEVELOPMENT OF PUBLIC LIBRARY SERVICE

The library shall maintain institutional memberships in the American Library Association and the Ohio Library Council. Each Board member shall have an individual membership in both OLC and ALA.

To develop and increase effective library service, and to strengthen resources, the library shall cooperate with and take advantage of the services offered by the State Library of Ohio. The development of maximum effective library service shall be promoted through cooperation with other libraries and institutions in the area and state, through membership in the Northeast Ohio Regional Library System (NEO-RLS), and through participation in the Ohio Public Library Information Network (OPLIN).

Recognizing the advantage to the citizens of the community, the library shall participate in such cooperative services as the reciprocal book return, interlibrary loans, library delivery and such other services as may be economically feasible and efficient. Generally, the library shall not duplicate special services being furnished to agencies or individuals in the community by another library system, but will promote and advertise the availability of these services.

The library shall cooperate with for-profit institutions and businesses, especially those that are local, when it is deemed appropriate and of benefit to the residents of the Cleveland Heights-University Heights City School District. In return for such cooperation, the library may from time to time allow recognition of such for-profit institutions and businesses when that is determined to be the proper way to thank the institution for their support of the library.

## III.

## SERVICE POLICIES

A. Individuals

At the Cleveland Heights-University Heights Public Library, the customer's needs are our top priority. Our goal is to anticipate those needs, fulfill them the best we can, and provide our customers with a more rewarding experience than they can get at other public libraries.

Preface, *Human Resources Manual*, June 2000

Library service, both to those who enter the library and to those who access the library electronically or by telephone, shall be based on the principle that assistance in locating appropriate materials and information, and help in using library resources, shall be restricted only by the time and staff available. Materials that are not owned by the library shall be made available, when possible, for customers through interlibrary loan from other libraries. Telephone and online reference service shall be available.

Guidance to the individual may be by personal consultation, lists of materials, displays, instruction in use of the library, use of online services, as well as through group participation in library related activities, and through means of mass media.

B. Groups

Appropriate means shall be used to encourage the use of books and other materials, either in the library or community, through the availability of library material-related programs. Assistance to groups may include furnishing materials related to group programs and providing speakers on the resources and services of the library including availability of meeting rooms and community bulletin boards.

C. Community Relations

It shall be the objective of this library to involve the interest of citizens of the community in the development and use of their library. Specific statements are given below.

1. Friends of the Cleveland Heights-University Heights Public Library. The Board welcomes the interest of this group, formed for the purpose of increasing, improving and making better known the resources and services of our libraries, as well as their financial support and promotion of the library programs.

Books and other materials withdrawn from the library's collection may be given to the Friends. Such items may then be sold and the proceeds used to fund library programming.

2. Organized Groups. Cooperation with organized groups in the community shall be sought and sustained when they help the library realize its objectives as an information resource and community center.

3. For-Profit Organizations and Businesses. As a governmental entity that receives non-profit status from the state and federal government, the perception that a library promotes or favors any for-profit institution is inappropriate. However, libraries often receive support from for-profit institutions and local businesses, either in cash or in-kind donations, and it is appropriate for the library to recognize that support. Care must be taken, though, so that one local business or institution is not recommended over another or that the perception of favoritism might be present.
4. Communications. Members of the community wishing to be heard by the Board on any matter may communicate through letter to the Board President or any member of this Board. The Board welcomes residents attending Board meetings. These meetings are tape recorded and statements become part of public record. Those bringing matters before the Board are asked to limit their remarks to no more than five minutes and that their name and address be included. Because agendas of meetings are set in advance, no discussion of a presenter's topic will take place at that meeting. The Board will give careful consideration to residents' concerns and will respond.

Annual Report. A summary of the activities and services of the library shall be prepared and distributed annually. The annual report and the library's *Comprehensive Annual Financial Report* shall both be made available to the community through the library's Web site.

5. Public Library - School Library Relationship. It is recognized that there is an inter-relationship of libraries of all types, and that services may overlap between public and non-public libraries. The following definitions of the differing responsibilities of the public library and the school library shall be a guide in the development of complementary services. Whenever possible, the public library makes an effort to support the curriculum of the schools, and in some cases, provides access to electronic databases.

The Public Library is designed to serve the reading and recreational needs, interests and purposes of all the people of all ages in its area. It is the community's major center for reliable information with a clientele as broad and varied as the community itself. Library users are served on an individual basis, as well as in groups. The use of a public library is characterized by its voluntary nature and its informality. The public library complements and supplements the school library (media center) but carries the broader responsibility to the total community. As part of its program, the public library supplies children and youth with services and materials primarily to satisfy their self-motivated interests. At the same time, it is recognized that the library is also used by public and private school students after school hours, as well as by homeschooled students, for research in fulfilling their assignments.

The School Library (Media Center) is designed for children and young people engaged in the formal learning process, supports the curriculum and meets educational needs through materials and services. It also provides for leisure activities as well as independent study not directed by formal learning experiences. It reflects the philosophy and objectives of the school program. The media center is an instructional materials center or learning resource center and is a laboratory for research where students learn to develop library and study skills. The school librarian is a member of the teaching staff. As an essential part of the total school program, the provision for adequate, functioning school libraries is the responsibility of school authorities.

#### 6. Gift Acceptance

- a. The library will accept gifts for the benefit of the system unless such gifts can be construed as affecting the business judgment and relations of the staff or members of the Board of Library Trustees.
- b. Library materials accepted by the library are subject to the *Materials Evaluation and Selection Policy*. Materials given to the library shall be the property of the library to be used or disposed of as staff deems appropriate.
- c. Evaluation of Gifts. Requests for price evaluation of gift materials shall be answered with the suggestion that the donor consult disinterested persons engaged in the business of buying and selling such materials who can give a fair market value. By law, the library is unable to furnish an appraisal for tax deduction purposes.
- d. Memorials, Endowments, Commemorative Gifts. Gifts for the enrichment of the library, other than library materials, shall be accepted on an individual basis and subject to review by the Board.
- e. In-Kind Donations and Gifts. As deemed appropriate by the Board of Library Trustees or their designee, the library will from time to time, solicit financial support and in-kind donations from for-profit institutions and businesses. Appropriate recognition of these donations, as determined by the library, shall be made.

#### D. Accessibility

1. The library welcomes all users who, by their presence, acknowledge their responsibility to maintain an atmosphere conducive to the best use of the library and its services.
2. The rights of an individual to use the library, its services and its materials, shall not be denied or abridged because of age, race, religion, national origin, sexual orientation, mental or physical handicap, or social or political views.

It is the intent of the Cleveland Heights-University Heights Public Library to serve everyone equally and to assure access to library materials, programs and facilities for all persons. The library will make every effort to provide reasonable accommodations as necessary under the Americans with Disabilities Act (ADA).

Parents are responsible for supervising their children in the use of the library and its materials. The library cannot assume the responsibility for children left unattended. The library is not responsible for materials used or borrowed by juveniles which their parents may find objectionable.

Failure to return materials and to pay appropriate charges, or the destruction of library property shall be due cause for which the use of the library and/or its services may be denied. Municipal ordinances shall be enforced. Copies are appended to these *Policies*.

3. Outreach. The library acknowledges that there are residents of all ages in the community who, for whatever reason, cannot and/or do not avail themselves of the library's services and facilities. Furthermore, the library recognizes its responsibility to explore strategies for extending library service to these non-users and to implement these strategies when fiscally feasible.
4. Internet Access Policy. A policy for the use of the Internet by the library's customers has been developed. It is appended to these *Policies*.
5. Hours of Service. The libraries shall be open the greatest number of hours needed by the community, subject to limitation of funds available to provide adequate staff. Any change in regular hours of service shall be subject to approval by the Board. Emergency closing shall be the responsibility of the Director.

The library shall be closed on the following legal holidays;

- New Year's Day
- Martin Luther King, Jr. Day
- Memorial Day
- Independence Day
- Labor Day
- Thanksgiving Day
- Christmas Day

The library shall also be closed on Easter Sunday and Christmas Eve day.

When New Year's Day, Independence Day or Christmas Day fall on Sunday, the library shall be closed on Sunday and Monday. Saturday hours shall be observed on New Year's Eve except when it falls on Sunday.

The branch libraries shall be closed on Sundays for the period commencing with the first Sunday after the public schools close for the summer and ending with the Sunday preceding Labor Day.

The library shall close one day each year, usually the third Friday in September, for "Staff Development Day." This is an opportunity for all employees, full and part-time, to gather off site for various educational and instructional programs, generally geared to the work performed by the library.

6. Displays. The use of library facilities for posters, flyers, pamphlets, displays, and exhibits, other than those that pertain to the library, shall be approved by the library Director or designee and subject to review by the Board of Trustees. Permission shall be given based upon limitations of space, timeliness, and relevance of the material to the civic, educational, cultural, recreational, and vocational service to the community. The library will not display personal advertisements or for-profit or commercial fundraising materials. Political materials will be displayed in the library during elections.

The views expressed by such displays and literature exhibited in the library do not, necessarily, reflect the views of the library.

7. Book Returns. For the convenience of the library's clientele, exterior book returns shall be available at all buildings. Pick up lockers are available at the Lee Road Library.

8. Meeting Rooms. As a community gathering place, the library is pleased to make its meeting rooms available to the public, in accordance with law. Decisions on meeting room use are subject to review by the Board of Library Trustees. The use of the meeting rooms shall be recorded and reported annually. Library programs take precedence over all other scheduled events.

- a. Room reservations are made electronically at [www.heightslibrary.org](http://www.heightslibrary.org) or by contacting library staff. Applications are pending until approved by library.
- b. The use of library meeting rooms shall not cause a disturbance in the library. Adults using meeting rooms must not leave children unattended.
- c. Library meeting rooms will be made available once per month at no charge to all non-profit 501(c) (3), or school-related organizations, chapters, divisions or branches there-of. Additional reservations are allowed (in excess of one per month) for posted fees. (See "Fees & Charges")
- d. Groups requesting a meeting room for a social purpose will be allowed such use, for an appropriate fee. (See "Fees & Charges")
- e. For-profit groups may request a room for events that are not commercial in nature. (See "Fees & Charges")
- f. The use of the meeting rooms by non-library groups shall not be publicized in such a way as to imply library sponsorship.
- g. All fees are due two weeks before the event. Fees will be returned only if cancellation is received at least 48 hours prior to event. Failure to provide 48-hour notification of cancellation will result in a \$25 charge.
- h. It is possible to reserve Meeting Rooms for before or after regular library hours, although requests are not guaranteed. If security staff is available and requests can be granted, an extra, per-hour charge (in addition to room fees) will be assessed.

- i. Any group using a library meeting room may charge a reasonable fee to recover the costs of materials, handouts, craft-making supplies, refreshments, etc. Ten percent of the sale price of anything sold as part of a Meeting Room program must be donated to the Friends of the Cleveland Heights-University Heights Public Library. For rooms being provided at no charge, all meetings must be free and open to the public.
  - j. Furniture arrangement for each room will be posted. Attendees may change arrangement but must return room to condition in which it was found. All rooms, and kitchenette, must be left neat and clean or an additional \$25.00 charge will be assessed and room privileges lost.
  - k. Applicants must be 21 years of age and must be present to supervise all minor groups.
  - l. Space shall be available when possible for small groups or for tutoring. These spaces cannot be scheduled in advance.
  - m. The library assumes no responsibility for personal belongings.
  - n. The library reserves the right to close in the event of an emergency and will refund all fees.
  - o. As possible, and based on availability, the library will have certain equipment, such as easels, flip charts, lecterns, coffee pots, TVs, projectors, and the like, available for use in our meeting rooms. Responsibility for any damage rests solely with that group using the equipment.
  - p. No alcoholic beverages are allowed unless approved by the Director at events held after regular library hours and for a defined group.
9. Behavior and Conduct on Library Property. To maintain an atmosphere appropriate for work, study and enjoyment for all library users and staff, the following policy on behavior in the library's buildings and on library property has been established.

#### Definitions

Code of Conduct: Our communities have asked us to keep their libraries safe and respectful. Disruptive behavior of any kind is not permitted. Library staff has the authority to determine what is disruptive. Disruptive customers will be asked to leave library property. (Adopted by the Board of Library Trustees, July 16, 2006)

Appropriate library activities include, but are not limited to: browsing for materials, reading, thinking, quiet conversation, homework, writing reports and researching. If computers or audio-visual equipment are used, they are to be used quietly, so as not to disturb others.

Inappropriate library activities include, but are not limited to: running, throwing, loud or abusive talking, or eating when it causes a disturbance, moving furniture, putting feet on

furniture, loitering, gambling, proselytizing, soliciting, selling, distributing leaflets and any other activities, except as noted in Section 10, below, which disrupt the library and make it less useful for those appropriate library activities. Any illegal activities, including vandalism, will not be tolerated.

Disruptive behavior is defined as, but is not limited to: noisy, boisterous or acting-out behavior which is inappropriate in a setting where business is being conducted. This behavior may represent a physical danger to people or property, or may interfere with the legitimate library business of other customers or staff.

- a. No inappropriate or disruptive behavior will be allowed within library buildings or on library property.
- b. Obstructing the entrances or exits of library buildings is not permitted.
- c. Customers shall turn off the ringer to their cell phones so as not to disturb others.
- d. For children's safety, photography of minors is not permitted without written parental permission.
- e. Dogs, other than assist dogs, are not allowed on library premises.
- f. Library staff have the ultimate authority to interpret disruptive behavior.
- g. Concealed weapons. Pursuant to Section 2923.126 of the *Ohio Revised Code* the carrying of concealed weapons shall not be permitted within the library. Specifically, according to the *Code*, "no person shall knowingly possess, have under the person's control, convey, or attempt to convey a deadly weapon or dangerous ordnance onto these premises."
- h. Pursuant to Section 3794 of the *Ohio Revised Code*, smoking is prohibited in the library. It is also prohibited immediately adjacent to any entrances or exits of a library building. Our obligation is to ensure that tobacco smoke does not enter any public space where smoking is prohibited under the law.

#### 10. Surveys, Solicitation and Literature Distribution.

- a. Gathering petition signatures is not allowed within library buildings. It is allowed on library property so long as doing so does not obstruct the buildings' entrances or exits.
- b. Distribution of literature on Election Day is restricted, by law, to no less than 100 feet from the entrance to the building that houses the voting. Violations should be reported to the Booth Official or to the Board of Elections.
- c. Surveys. In order to plan for new or improved services, the library may survey its customers or other residents of the community. These surveys may be conducted in the library buildings, by telephone or by mail, online or by any other appropriate method. Surveys may be designed and/or completed by staff or third party vendors

or volunteers approved by the library. All survey instruments, methodology and implementation procedures must be approved by the Director prior to contacting any members of the public.

Surveys of library staff may be conducted for the purpose of pre-testing public surveys, or to obtain staff opinions on services or personnel issues. All survey instruments, methodology and implementation procedures must be approved by the Director prior to contacting any members of the staff.

Individuals or organizations that wish to conduct any type of library survey with staff or customers must receive written permission from the Director.

d. Solicitation of the staff or the public, in ways which are of benefit to the library and/or its employees, are permitted as follows:

- 1) Contributions from staff for established charities approved by the Board of Trustees such as United Way or Community Shares;
- 2) Collections for staff gifts for personal reasons such as retirement, illness, and other activities as approved by the Director;
- 3) Friends of the Library fundraising for library support such as book sales and the sale of merchandise with prior approval and coordination with other activities by the Director;
- 4) Solicitation of and/or distribution of literature to library employees by other employees may be permitted only in non-work areas and only during non-work time. Non-work areas are defined as staff rooms. Non-work time includes time allotted for lunch or dinner and break periods.

In no event shall literature be left on tables or distributed in any manner other than directly to fellow employees, except for literature that specifically supports the library's goals for professional development in public service.

Solicitation of and/or distribution of literature to library employees by other employees for any purpose is prohibited at all times in all work areas of the library.

- 5) Any activities for non-profit, community organizations (i.e., sale of Girl Scout Cookies, band candy, etc.) may be permitted among staff in non-work areas during non-work hours. But any activities of a profit-making nature (i.e., cosmetic and greeting card sales, etc.) must be done off library premises on employees' own time.
- 6) Other solicitation which specifically support the interests of this library or libraries in general, as approved by the Director.

- e. Handbills/notices on windshields. The Codified Ordinances of the cities of both Cleveland Heights and University Heights prohibit any individual or group from placing handbills, notices, and the like, on automobiles in the library's parking lot.

E. Civic Responsibility

As an institution of education for democratic living, the library shall provide access to public records of the municipalities and Board of Education both as a depository (agendas, resolutions, minutes, budgets, annual reports, etc.) and as a place for disbursement of publications of a civic nature.

The *Materials Evaluation and Selection Policy* of the Board of Library Trustees states that

“Materials presenting all points of view concerning the problems and issues of our times, international, national and local, shall be provided, if available, and shall not be excluded from library shelves because of partisan or doctrinal disapproval.”

To this end, display space shall be planned for posting information, both pro and con, regarding issues to be placed before the community for decision.

To make voting rights available to a maximum number of citizens, the library shall provide voter registration service.

## IV.

## ADMINISTRATION POLICIES

A. Organization - Facilities

The Cleveland Heights-University Heights Public Library is a community gathering place providing comprehensive library resources, services and programming for the community through a Main Library, three neighborhood branches and on the Internet through our web site.

The Lee Road Library (the Main Library) shall provide centralized services for the system and house the Administrative and Business Offices, Public Relations, and Technical Services Department. The central collection of the system shall be maintained in the Lee Road Library and shall include a strong reference resource for the community with a broad range of materials, electronic and traditional, both circulating and non-circulating, consistent with the standards of the *Materials Evaluation and Selection Policy*. The Lee Road Library shall serve its immediate community within the larger community by providing popular circulating collections and access to resources outside the CH-UH system.

The branch libraries shall provide library service to their immediate neighborhoods, which reflects that community's interests, and provides access to resources at the Lee Road Library.

B. Organization - Staff

The library staff is committed to providing excellent customer service, following the library's customer service standards, and creating good rapport with the community. They shall be alert to recent developments in librarianship and new avenues of service. Staff may be called upon to interpret the rules and regulations of the library. The services available shall be limited only by the creative imagination of the staff and the funds available. Programs are offered that are of interest to our clientele and to the communities we serve. Often, staff, because of their training or personal expertise, will actually provide programs to children, young adults and adults, or staff will create the concept and arrange for outside speakers or presenters. Through open communication with each other, with colleagues in other libraries, and with community residents, staff shall constantly look for new and interesting program ideas.

Administrative division shall be made for service to adults, service to young adults; service to children; circulation (loan) service; processing new materials; marketing and communications; and administrative and business office functions. Coordinators of departments of the Lee Road Library shall provide guidance and counsel to the branches to ensure an equality of service throughout the system.

1. Service to adults. The functions of the adult services staff are to develop and maintain an appropriate materials collection for adults—to provide reader's guidance, reference and information services; public programs; and to maintain a liaison with community agencies.

2. Service to young adults. Young adults shall have full access to the total resources of the library and its programs. While service is similar to that for adults, a separate collection, carefully selected to serve as a bridge from the children's to the adult collection, is required. Staff trained in the needs of adolescents and their library interests is essential. Liaison shall be maintained with other community organizations working with young adults.
3. Service to children. Children shall have full access to the total resources of the library and its programs. Special collections of materials suitable for use by boys and girls, and adults in the field of children's literature, shall be selected, maintained and interpreted by staff trained in this specialized work and in programming for this age group. There shall be no arbitrary age nor grade limitation on service to children. Liaison shall be maintained with other child centered groups in the community.
4. Circulation (loan) service. Personnel assigned to circulation services shall provide efficient service for customers through the charging and discharging of materials as well as through inter-branch and external delivery of library materials. This department is often the initial contact with library users and staff are often responsible for interpreting many of our rules and regulations.
5. Technical Services Department. Staff assigned to this department shall be responsible for the ordering and processing of library materials and for maintaining the budgetary records of the library's materials collection. This will include directing and coordinating all functions related to the purchasing and processing of library materials for the system.
6. The Marketing and Communications Department. Staff in this department shall coordinate the marketing and publicizing of the library's services, collections, programs and policies; create and produce all system signage; create and maintain the library's Web presence; create, produce, and coordinate all aspects of printed communication and establish and maintain a relationship with the media and other organizations.
7. Information Technology Department. Staff in this department are responsible for maintaining the library's computer equipment, its local and wide area networks (LANs and WAN), and operating system, communications and other software.
8. Buildings Department. Staff in the Buildings Department shall provide the system's shipping services and for the maintenance, upkeep and cleanliness of the library's facilities.
9. The Administration. Administrative personnel, specifically the Director and Deputy Director, provide leadership to the staff in promotion, interpretation, and support of library policies and procedures. This leadership includes planning, directing and coordinating the services and personnel of the library based on the *Policies* of the Board of Library Trustees and on the *Mission Statement, Values* and *Vision* of the library.

The Business Office. Staff in this department shall provide for the fiscal accounting, records keeping, maintenance operation and personnel management of the library.

- C. Information Technology. The library recognizes that technological innovations may have positive applications for improving public service. Maintaining existing hardware and software, including the library's Web site, and the evaluation and implementation of new technologies, shall be a responsibility of the staff.
- D. Publicity and Promotion. Our customers' perception of the library is dependent on every contact with it they have. Therefore, it is the responsibility of every staff member to present a positive image of the library at all times. Excellent customer service is our highest priority.
- E. Materials Collection.
1. Classification. The Dewey Decimal Classification as currently in national use shall be the classification system for the library's materials.
  2. Selection and Evaluation. All selection is subject to the *Materials Evaluation and Selection Policy* of the Board of Library Trustees.
  3. Inventory. A record of the quantities of the materials holdings shall be maintained and included in the annual report to the Board.
- F. Programming
1. Programs developed by staff. Library programs are designed for people of all ages and are free of charge and open to the public. The purpose of programming is to complement the library's collections and services and support its Mission, Vision and Values. Co-sponsorship of programming with other community entities, representing various perspectives of the population regardless of background or economic status, will be encouraged. If a program is controversial in nature, the library will seek to present as much balance as possible. Beliefs and opinions expressed in the program do not necessarily represent the viewpoint of the library, Board or staff.  
  
Library staff will also take programming out into the community (outreach), where appropriate, and share programs and presentations over the Internet.
  2. Programs presented by customers within the library. Programs cannot constitute commercial advertising or represent direct solicitation. Some persons, such as attorneys, members of religious organizations, agents of health care groups, investment brokers, realtors and insurance representatives, may seek to present information to the public at the library about their organization, its services or the issues with which it deals. Although this information may be of value or general interest, the underlying purpose of these programs is to gain community recognition of the person and/or the business by which they profit. **The library does not allow programs of this kind.** Such individuals may be asked to partner with the library and present part of a balanced presentation on their topic.
- G. Circulation (loan) Service
1. Circulation System. By agreement, the Cleveland Heights-University Heights Public Library participates in CLEVNET, the computerized circulation system and online public access catalog of the Cleveland Public Library.

2. Registration. Anyone who lives, works, owns property or goes to school in the state of Ohio is eligible, with proper identification, to borrow materials from the library. A borrower's card shall be free of charge. Registration for a child under 16 years of age shall be signed by a parent or guardian presenting proper identification.
3. Confidentiality of Library Records. Circulation records and any other library records that identify the names of library users with specific materials or information requests are confidential in nature and are protected by section 149.43 of the *Ohio Revised Code*.

Except as noted below, these records or any information from the records shall not be given to, or made available to, any individual or group or any agency of state, federal or local government except pursuant to such court order or subpoena as may be issued under the authority of federal, state or local law relating to civic, criminal or administrative discovery procedure or legislative investigatory power.

If any such order or subpoena is issued, the library will comply after the library's officers have consulted with their legal counsel to determine: a) if such documents are in proper form, and b) if there is showing of good cause for their issuance. If the documents in question are not in proper form, and/or if good cause is not shown, the library's officers will insist that any defects be cured before the requests are complied with.

However, exigent circumstances, such as life and death situations or matters involving public health or safety, may require an immediate decision. In such cases, the Director or Deputy Director, or if they are not available, the staff member in charge of the building, should be contacted.

If a library record or patron information pertaining to a minor child is requested by the minor child's parent, guardian or custodian, the library staff shall make that information available in accordance with division (B) of section 149.43 of the *Ohio Revised Code*.

The 2001 USA Patriot Act expands federal law enforcement's surveillance, seizure and investigative powers. Within the library, this could mean that a search warrant might be used to obtain information. A search warrant can be executed immediately whereas a subpoena allows a period of time to respond and possibly contest the court's request. Please refer to the library's Privacy Statement, found on the library's Web site, for further information.

4. Borrowing Regulations
  - a. The Board shall receive monthly reports of the items circulated within the system.
  - b. Borrowing privileges shall be limited or denied when large fines or other charges are unpaid at this library or other libraries participating in CLEVNET.
  - c. Materials may be returned to any library in Ohio.

- d. Reserved Material. If specifically requested material is owned and cataloged, or on order within the system, a hold may be placed on it. If it is not owned, an attempt will be made to borrow it from another library via interlibrary loan, if feasible. When material is available, notification shall be by telephone, mail or email.
  - e. Overdue Materials. A limited fine shall be charged for overdue materials. A borrower shall be notified when library materials are overdue. When necessary, and upon notification of the borrower, a messenger may be sent for the material at an additional charge.
  - f. Golden Buckeye Cards. Senior Citizens possessing a Golden Buckeye Card shall not be charged fines.
  - g. Lost and Damaged Materials. The borrower is responsible for materials charged out from the library on his/her card. Charges for damages or losses shall be based upon the replacement price of the materials.
5. Length of Loans. The majority of the materials of the library shall circulate for a period of 21 days. Newer materials may circulate for only one or two weeks.

Most materials not on reserve for another customer may be renewed.

The library's circulation and renewal periods may be found on the library's Web site.

Materials borrowed from other libraries may have different loan periods.

Non-circulating materials may be borrowed overnight at the discretion of the Adult Services, Young Adult Services or Children's Services staff at any branch. Staff may require a cash deposit in an amount up to the replacement cost of the item.

Vacation Loans. Materials not in demand may be loaned to borrowers planning holidays away from the city for a period not to exceed four months.

Teacher Loans. A collection of books may be charged to a teacher for a period of 42 days (six weeks). No fines are charged for children's materials.

## Cleveland Heights–University Heights Public Library Guidelines for Fines and Charges

Philosophically, the Board of Library Trustees believes the library should provide information equally to all persons, regardless of their ability to pay for that information. Additionally, the Board supports the premise that no additional costs should be placed on library services within the limitations of the library's funding.

The Cleveland Heights–University Heights Public Library has two primary sources of financial support: our portion of the Public Library Fund (formerly the Library and Local Government Support Fund), 2.2% of the state's General Fund revenue specifically allocated to public libraries; and two continuous property tax levies, one for 4 mills that began collection in 1992, the other for 1.9 mills that began collection in 2000. These levies specifically support this library within the Cleveland Heights–University Heights School District.

Several statements can be made which serve to further clarify these guidelines:

- Borrower's cards are available free upon presentation of proper identification. A replacement fee will be collected if a borrower's card is lost;
- Borrowing any of the library's circulating materials is free of charge. A fee is charged if materials are lost, damaged or are returned after the date upon which they were due;
- The library's non-circulating materials (i.e., microforms, reference books, most newspapers) may be used in the library by anyone. A fee is charged to anyone wishing to make copies so that the information may be taken out of the library;
- Use of the library's meeting rooms is generally free, within the developed guidelines;
- A typewriter is available at the Lee Road Library for use by our customers. There is no charge for use but supplies are not provided;

Printers are connected to most library computers used by the public to access the Internet and electronic databases and for word processing, spreadsheet programs, etc. There is a charge for some printing.

As approved by the Board of Library Trustees, June 20, 1994  
Revised March 19, 2001  
Revised May 19, 2003  
Revised March 19, 2007  
Revised April 21, 2008



# Cleveland Heights-University Heights Public Library

## *Service and Administration Policies*

### Appendix F

#### **Property Disposal Procedure**

It is the policy of the Cleveland Heights-University Heights Public Library to dispose of library materials, furniture and equipment that is no longer functional or useful. The Library adopts the following policy for the disposal of such library property.

When an item is fully depreciated or no longer has a useful value to the library, it will be removed from the inventory of the library and disposed of:

1. Books and other materials, no longer deemed appropriate for the collection, will be donated to the FRIENDS of the Cleveland Heights-University Heights Public Library for disposal through their regular book sales.
2. Computer equipment, no longer of use to the library, may be donated directly to the Cleveland Heights-University Heights City School District or other non-profit and/or charitable organization.
3. Furniture, no longer of use to the library, the depreciated value of which is less than \$300.00, may be donated by the library to a non-profit, charitable organization.
4. Items not covered by the above will be sold through auction or publicly advertised sale with any proceeds from such sale being deposited to the general fund of the library. Prior to such sale, the Clerk-Treasurer will prepare a list of those items to be included in the sale for approval by the Board of Library Trustees.
5. If an item is determined to have only marginal value or no value, or it does not sell through auction or publicly advertised sale, it may be sold or discarded to the best interest of the library.

The Clerk-Treasurer is authorized to accept trade-in allowances on any item of equipment being replaced or upgraded for which a trade-in allowance is offered.

In an instance where an item(s) of surplus inventory is determined by the Clerk-Treasurer to have unusual, historic or artistic value such item(s) may be referred to the Board for determination of value which determination may include the services of a professional appraiser or outside expert opinion.

Approved by the Board of Library Trustees, March 15, 1999

# Cleveland Heights-University Heights Public Library

## *Service and Administration Policies*

### Appendix G

## Records Retention Policy

It is the practice of the Cleveland Heights-University Heights Public Library to retain certain records from year to year. Although the *Ohio Revised Code* does not set forth guidelines for public libraries, the Board of Trustees of the Cleveland Heights-University Heights Public Library, acting as the library's Records Commission, adopts the following policy for records retention.

Records fall into two categories: Permanent and Non-Permanent. Retention of records may be in the form of electronic media, print, or tape. The following list shows the retention period of specific records, which is compiled from recommendations from the Auditor of State's Office and the Ohio Historical Society.

### **Permanent:**

- Annual Director's Report
- Annual Financial Report to the State Auditor (CAFR)
- Annual Statistical Report to the State Library
- Audit Reports from the Auditor of State
- Board of Trustee Minutes
- Deferred Compensation Deduction Reports and Statements
- Dependent Benefit Coverage Forms
- Current Fixed Asset Inventories
- Historical Files
- Personnel and Annual Payroll Summary Reports
- PERS Records

### **Non-Permanent:**

#### **Contracts:**

Bids - Successful	4 years after project completion Provided audited
Bids - Unsuccessful	4 years provided audited
Contracts, Leases, Grants	4 years after expiration provided audited
Insurance Policies/Bonds	4 years after expiration

### **Retention Period:**

**Employee Files:**

Accident Reports/Incident	4 years provided audited
Employee Personnel Files - including Leave requests (sick & vacation), W-2, W-4, I-9, IT-4, Workers Com- pensation claims, Emergency Contact forms.	10 years after termination
Employment applications	6 months active; 1½ years inactive, if not hired
Unemployment Compensation Claims	4 years after case closed and appeals Exhausted provided audited

**Financial:**

Accounts Payable Ledger	3 years provided audited
Appropriation Ledger	3 years provided audited
Bank Deposit Receipts	3 years provided audited
Bank Statements	3 years provided audited
Budgets (Annual)	10 years
Canceled Checks	3 years provided audited
Cash Journals	3 years provided audited
Gift Donor Cards	3 years provided audited
Check Registers	3 years provided audited
Depository Agreements	Until superseded/audited
Invoices with Vouchers	3 years provided audited
Payroll Bank Statements	3 years provided audited
Payroll Tax Records	6 years provided audited
Petty Cash Reports	3 years provided audited
Purchase Orders	3 years provided audited
Receipt Journals	3 years provided audited
Time Sheets & supportive documents (i.e.: department schedules)	3 years provided audited
Travel Expense Vouchers	3 years provided audited

**Legal:**

Claims and Litigation Records	5 years after case is closed and appeals exhausted
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**Library Materials:**

Book Inventories	Maintained Online until superseded
Interlibrary Loan Records	7 days after materials are returned unless there are financial implications
Lost Book/Fine Records	Once paid for, removed from patron history

**Miscellaneous:**

Library Bulletins	30 days after obsolescence
Correspondence (Executive), including electronic mail	1-5 years if no historical value
Board Working Papers	3 years provided audited and no historical value
Form Files	Until expiration
Inventories	Until superseded
Position Descriptions	Until superseded or classification abolished
Patron information	Permanent, or 3 years if inactive.
Circulation Information	Maintained online until materials are returned

Regardless of format, computer back-ups of any of the above referenced records shall follow the same retention period as paper records.

“Provided audited” is defined as the Auditor of State’s office has audited the fiscal years encompassed and the audit report has been duly released.

This Policy will be reviewed by the Local Government Records Program of the Ohio Historical Society and the Records Officer of the Auditor of State.

This Policy was approved by the Board of Trustees, Cleveland Heights-University Heights Public Library, at their regular meeting of March 15, 1999.