



BELMONT LITERARY & HISTORICAL SOCIETY FREE LIBRARY

Policy Manual – 2025 Edition

This document contains the official policies adopted by the Belmont Library Board of Trustees. For questions or clarification, please contact the Library Director.

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Belmont Literary and Historical Society Free Library By-Laws, Powers and Responsibilities of the Board of Trustees

Mission Statement:

The Belmont Literary and Historical Society Free Library is a cornerstone of community connection, knowledge, and opportunity. We strive to provide free and open access to resources, technology, and services that empower individuals and strengthen our community. As a safe and inclusive space, we foster learning, creativity, and social acceptance. Through collaboration with local organizations, schools, and other libraries, we work to enrich lives, promote literacy, and encourage civic engagement. Together, we aim to recalibrate our community by inspiring lifelong learning and meaningful connections for all.

Preamble:

The Board of Trustee (hereinafter designated as the “Board”) of the Belmont Literary and Historical Society Free Library, a corporation created under a charter granted under section 253 of the New York State Education Law by the Board of Regents (Secretary of State) of the State of New York, dated February 9th, 1893, shall be governed by the laws of New York State, the regulations of the Commissioner of Education and by the following bylaws.

By-Laws:

1. Name of the Organization
 - a. The name of the organization shall be the Belmont Literary and Historical Society Free Library.
2. Purpose
 - a. The purpose of the organization is to provide quality library services to the residents, adults and children, of the communities of the Village of Belmont and the Township of Amity.
3. Fiscal Year
 - a. The fiscal year of the library shall be the calendar year, from January 1st to December 31st.
4. Board of Trustees
 - a. The library shall be governed by a Board of Trustees. The Board shall consist of nine (9) members, elected for terms of three (3) years each. Newly elected members shall take office at the first meeting following the annual meeting.
 - b. Eligibility for office shall be limited to adults residing within the geographical limits of the library’s chartered service area.
 - c. Absence from three (3) consecutive meetings shall constitute automatic dismissal from the Board unless the Board defers this dismissal by majority vote. The President shall inform the absent Board Member in writing that he/she/they is no longer on the Board. If

dismissal is deferred by Board action, the President shall inform the absent Board Member in writing the conditions of this deferral.

- d. Any vacancy shall be filled by special election by the remaining members of the Board for the remainder of the term of that particular position.
- e. The Board may remove a Trustee for misconduct, incapacity, neglect of duty, or refusal to carry into effect the library's education purpose as provided in Education Law 226; subdivision 8.
- f. Each Trustee shall have one vote, irrespective of the office held.
- g. A Trustee must be present at a meeting to have his/her/their vote counted or meet the provisions of New York State's Open Meetings Law.
- h. A majority of the whole Board (including vacancies) is required for any motion to pass
- i. All actions of the Board shall be of the Board as a unit. No Board member shall act on behalf of the Board, on any matter, without prior approval of the Board. No Board member by virtue of his/her office shall exercise administrative responsibility with respect to the library, nor as an individual, command the services of any library employee.
- j. All trustees must comply with continuing education requirements outlined in Section 260-d of New York Education Law.
- k. All trustees must comply with the Sexual Harassment Prevention training requirements in New York State Human Rights Law.
- l. New Board members should be active for a period of three (3) months prior to holding an office.
- m. The officers of the Board shall be the President, Vice-President, Secretary and Treasurer, elected annually by the Board at the annual meeting. These officers shall serve for a period of one year, or until their successors have been duly elected.
- n. Duties shall be listed in the "Duties and Responsibilities of the Board and Library Director" section of his policy book.

5. Committees

- a. Committees for specific purposes may be appointed by the President. Such committees shall serve until the completion of the work for which they were appointed.
- b. All committees shall make a progress report to the Board at each of its meetings.
- c. No committee will have other than advisory powers unless, by suitable action of the Board, it is granted specific power to act.
- d. The President shall be, ex officio, a member of all committees, with the exception of a nominating committee.

6. Meetings

- a. Regular meetings shall be held monthly at dates and times to be established by the Board. All meetings shall be in compliance with New York State Open Meeting Law.
- b. A special meeting of the Board may be called at any time by the President, or by the request of three (3) members for a specific purpose. No business may be transacted at such a special meeting except the stated business. All meetings shall be in compliance with New York State Open Meeting Law.

- c. The Annual Meeting shall be held in June of each year. The business transacted at this meeting shall include the election of officers and any new trustees.
- d. The operating and financial reports for the previous year shall be presented at the regular meeting in the first month of the library's fiscal year.
- e. The preliminary budget for the subsequent calendar year shall be presented for approval at the regular meeting in September, with the final budget presented for approval at the regular meeting in November.
- f. A simple majority of the whole Board (including vacancies) shall constitute a quorum for the conducting of all business. A majority of the whole Board (including vacancies) is required for any motion to pass. If a quorum is not present at a regular meeting, the attending members may set a date for another meeting to be held in one week, and the presiding officer shall notify the absent members of this specially called meeting.
- g. The order of business for regular meetings shall include, but not be limited to, the following items which shall be covered in the sequence shown unless circumstances make and altered order more efficient:
 - i. Call or Order and roll call of members
 - ii. Approval of prior meeting minutes
 - iii. Correspondence
 - iv. Treasurer's Report
 - v. Director's Report
 - vi. Old Business
 - vii. New Business
 - viii. Public Comment
 - ix. Other Business
 - x. Date of future Board Meeting
 - xi. Adjournment

7. Amendments

- a. Amendments to these Bylaws may be proposed at any regular meeting and shall be voted upon at the next regular meeting. Written notice of the proposed amendment or amendments shall be sent to all absent members at least ten (10) days prior to the voting session. A simple majority of the whole Board (including vacancies) shall be sufficient for adoption of an amendment.
- b. All rule or resolution of the Board, whether contained in these Bylaws or otherwise, may be suspended temporarily in connection with business at hand, but such suspension, to be valid, may be taken only at a meeting at which two-thirds of the members of the Board shall be present and two-thirds of those present shall so approve.

8. Termination of a Trustee

- a. The Board of Trustees hold the option to terminate tenure of a Trustee for cause, which includes, but is not limited to the following reasons:
- b. Excessive absenteeism – defined by three consecutive unexcused absences without notification of just cause.

- c. Behavior unbecoming would reflect badly upon the Library and/or the Board.
- d. Breach of confidentiality.
- e. Demonstrated lack of interest in Library policy or concerns.
- f. Conflict of interest with the Board of Trustees Purpose.

9. Procedure

- a. All procedures not specifically mentioned herein shall be in accord with Robert's Rules of Order, Revised.

Duties and Responsibilities of the Belmont Literary and Historical Society Free Library Board of Trustees

1. The Board has a Duty of Care, Duty of Loyalty, and a Duty of Obedience as outlined in the Handbooks for Library Trustees of the State of New York.
2. Create and develop the mission of the library and be prepared to articulate it clearly and concisely.
3. Regularly plan and evaluate the library's service program based on community needs.
4. Select, hire, and regularly evaluate a qualified library director.
5. Secure adequate, sustainable funding for the library's service program.
6. Exercise fiduciary responsibility for the use of public and private funds.
7. Adopt and regularly review policies and rules regarding library governance and use and defend them when challenged.
8. Maintain a facility that meets the library's community's needs
9. Promote the library in the local community and society in general
10. Attend all board meetings and be prepared to participate by reading all board meeting materials in advance.
11. Conduct the business of the library in an open and ethical manner in compliance with all applicable laws and regulations, the ALA Core Values, and with respect for the institution, staff and public.

President:

1. Preside at the meetings
2. Prepare an agenda
3. Authorize calls for any special meetings
4. Appoint all committees and serve as ex-officio voting member of all committees.
5. Sign official documents
6. Represent the board in public capacities.

Vice President:

1. Preside at meetings in the absence of the president
2. Assume and perform the duties and functions in the absence of the president

Secretary:

1. Record the minutes of all meetings
2. Issue notice of all regular and special meetings
3. After approval of minutes, file a signed correct copy for the library records.
4. Take care of correspondences as directed by the board
5. Meeting minutes must be made available within two weeks of a meeting, regardless of approval status, in order to comply with New York State Open Meeting Law.

Treasurer/Finance Officer:

1. Monitor internal financial controls
2. Ensure all board members are provided with understandable financial reports and be available to answer questions from trustees.
3. Prepare monthly reports to the board of receipts and disbursements

Library Director:

1. The board shall appoint a Library Director who shall be the chief executive officer of the library and shall have charge of the administration of the library under the direction and review of the board.
2. Responsible for the following:
 - a. care of the building and equipment
 - b. selection and management of staff
 - b. efficiency of library service to the public
 - c. operation of the library under the financial conditions contained in the annual budget
3. Submit reports to the board and attend all board meetings
4. Recommend policies and procedures to improve the efficiency and quality of library services
5. Other responsibilities of the Director are listed under the heading of "Job Description"

Conflict of Interest Policy

The Belmont Literary and Historical Society Free Library trustees and employees shall adhere to the highest standards of honesty, good faith, and fair dealing in all activities relating to the organization.

No trustee, employee, or any member of their respective families or households shall accept gifts, gratuities, or favors of any kind from any person, firm, or corporation doing business or seeking to do business with the library, and which could reasonably be expected to influence, or create the appearance of influencing, their actions affecting the library.

Without full and complete disclosure to and approval by the Board of Trustees, no trustee or employee shall have any position of influence with, or a material financial interest in, any other entity, the existence of which does or could reasonably be expected to conflict with the proper performance of their duties or responsibilities to the library, or which could reasonably be expected to affect their independent judgment and action with respect to transactions between the library and such other entity. If such a position exists, it must be disclosed to the Library Director and to the President of the Board.

Each trustee and the Library Director shall provide the Board of Trustees with a written notification of any transaction or situation that may imply any reasonable doubt concerning the possible existence of a conflict of interest by the director or staff person.

In the event that the library may wish to contract or enter into an arrangement for goods or services under circumstances that may present a conflict of interest affecting one or more of its trustees or employees, the following shall apply. The affected person(s) of the library agree(s) to provide full information to the Board of Trustees to allow the Board of Trustees to approve or disapprove by resolution, with the advantage of full disclosure, such contract or arrangement. The affected person shall recuse themselves from the vote.

Annually, and upon the start of duties, library trustees and employees shall complete and return to the President of the Board a Disclosure of Interests Form.

If no conflicts exist, the individual must indicate "No conflicts to disclose" on the form.

The President of the Board shall administer this policy. Any disputed action of the Library Director or other library employee with respect to this policy shall be resolved by the Board of Trustees.

Disclosure of Interests Form

The Conflict of Interest Policy, which sets forth standards of expected conduct, includes a provision requiring trustees and employees to disclose all interests that could result in a conflict.

Please complete and return this Disclosure of Interests Form. The disclosure requirements are intended to provide the Board with a systematic and ongoing method of disclosing and ethically resolving potential conflicts of interest. Although it is impossible to list every circumstance giving rise to a possible conflict of interest, the following will serve as a guide to the types of activities that might cause conflicts and that should be fully reported:

1. Outside Interests

- a. To hold, directly or indirectly, a position or a material financial interest in any other entity from which the individual has reason to believe the library secures goods or services, or that provides services competitive with the library.
- b. To compete, directly or indirectly, with the library in the purchase or sale of property or property rights, interests, or services.

2. Outside Activities

- a. To render directive, managerial, or consultative services to any outside concern that does business with or competes with the services of the library.

3. Inside Information

- a. To disclose or use information relating to the library's business for personal profit or advantage.

4. Gifts, Gratuities, and Entertainment

- a. To accept gifts, excessive entertainment, or other favors from any outside concern that does or is seeking to do business with the library—under circumstances from which it might be inferred that such action was intended to influence or possibly would influence the individual in the performance of their duties.
- b. This prohibition does not preclude business meals or other nominal benefits in the ordinary course of business.

Full disclosure of any situation in doubt should be made to permit an impartial and objective determination. Disclosure relates not only to yourself but also to your respective families or households.

Conflict of Interest Disclosure

A copy of the library's Conflict of Interest Policy has been furnished to me. I hereby state that I, or members of my respective families or households, have the following affiliations or interests that, when considered in conjunction with my position or relation to the library, might possibly constitute a conflict of interest. (Check "None" where applicable.)

1. Outside Interests

Identify any interests, other than investments, of yourself or your respective families or households, as described in the first numbered paragraph of the accompanying disclosure form.

() None

2. Investments

List and describe, with respect to yourself or your respective families or households, all investments that might be within the category of "financial interest", as described in the first numbered paragraph of the accompanying disclosure form.

() None

3. Outside Activities

Identify any outside activities, of yourself or your respective families or households, as described in paragraph number 2 of the accompanying disclosure form.

() None

4. Other

List any other activities in which you or your respective families or households are engaged that may be regarded as constituting a conflict of interest, giving particular attention to the paragraphs numbered 2 and 3 of the accompanying disclosure form.

() None

5. I hereby certify that neither I nor any member of my respective families or households has accepted gifts, gratuities, or entertainment that might influence my judgment or actions concerning the business of the library, except as listed below:

I hereby agree to report to the Board President any further situation that may develop before completion of my next questionnaire.

Signature: _____

Date: _____

Name (Printed): _____

Open Meetings Policy

Compliance with Open Meetings Law:

The Belmont Literary and Historical Society Free Library adheres to New York's Open Meetings Law, as outlined in Article 7 of the Public Officers Law. This law mandates that board meetings be properly posted, advertised, and open to the public. Additionally, any working sessions of the board where a quorum is expected must be advertised and open. A full copy of New York's Open Meetings Law is available online.

Notice of Meetings:

Notice of regular board meetings will be published in the local newspaper at the beginning of the library's fiscal year, posted in the library, and published on the library's website. If a regular meeting date is changed or if a special or emergency meeting is called, the library will provide notice on its website, in the library, and to local media at least 72 hours in advance whenever possible.

Meeting Locations and Remote Participation:

Board meetings must be conducted in person or via videoconferencing, provided that all videoconference locations are open to the public and listed in the meeting notice. Meetings may not be held by telephone, email, or mail communication. While trustees who are not physically present in person or through videoconference cannot vote, they may participate in discussions via speakerphone, provided that the public can hear their contributions.

Executive Sessions:

During an open board meeting, the board may enter an executive session in which the public is excluded. An executive session can only be convened as part of a public meeting, and the board must vote to enter into executive session while stating the general nature of the discussion for the record. The board may take formal action in executive sessions, except for the appropriation of public funds.

Public Participation:

New York's Open Meetings Law grants the public the right to attend and observe board meetings. However, it does not provide an automatic right for the public to speak or participate in discussions. The board will designate a public comment period, during which members of the public may address the board. The board president or meeting chair has the discretion to set time limits for public comments. Written comments addressed to the Library Board President are also welcomed for those unable to attend in person. Please view the Public Comment Policy for rules and procedures.

Minutes:

Minutes will be taken at all board meetings as required by the Open Meetings Law. Regular session minutes will summarize motions, proposals, resolutions, and votes. While not required, additional discussion summaries may be included. Minutes will be made available to the public within two weeks of

a meeting, regardless of approval status. Minutes for executive sessions are only required if formal action is taken and it will summarize the final determination or action of the session.

Accessibility:

Members of the public with disabilities who wish to attend a board meeting should contact the library director in advance to request reasonable accommodation.

By adhering to this policy, the library ensures transparency, accountability, and compliance with New York's Open Meetings Law.

Public Comment Policy

Purpose:

The Belmont Literary and Historical Society Free Library Board of Trustees provides an opportunity for public comment during its regular board meetings in accordance with New York State's Open Meetings Law. Residents of the library's service area may use this time to verbally address the board. The Library Board reserves the right to determine the manner in which public comments are received to ensure a fair, respectful, and well-managed meeting.

Rules and Procedures for Public Comment

- Participants must sign in and provide their community of residence.
- Participants must be a resident of the library's service area.
- Residents will be recognized in the order in which they signed in.
- Each resident will be allotted a maximum of five (5) minutes to speak.
- A resident may only speak once per meeting and must use their five (5) minutes consecutively.
- Comments must be limited to library-related matters.
- A designated library trustee will preside over the public comment period.
- A designated trustee will introduce each resident and keep track of the time.
- The Library Board may limit the total amount of time allocated for public comment to 30 minutes per meeting.
- The Library Board will listen to residents but will not engage in dialogue, address issues, or answer questions during the public comment period.
- The Library Board may not vote on any issue raised during public comment unless it is already specified on the meeting agenda.

Submission of Written Comments:

Residents who are unable to attend a meeting may submit written comments to the Library Board of Trustees. Written comments should be addressed to the Library Board President and will be distributed to all trustees for review.

Collection Development Policy

The Belmont Literary and Historical Society Free Library is committed to providing a diverse, current, and relevant collection of materials to meet the educational, informational, cultural, and recreational needs of our community. This policy guides the selection, maintenance, and reconsideration of library materials and reflects the library's dedication to intellectual freedom, access to information, and serving all individuals within our service area.

The Belmont Literary and Historical Society Free Library staff and Board of Trustees affirm the American Library Association's Library Bill of Rights, Freedom to View, and Freedom to Read statement, in support of acquiring and managing collections.

The Library Director is responsible for selecting materials in accordance with this policy. Qualified staff may be assigned selection responsibilities under the Director's supervision. Selection decisions are guided by professional judgment, community needs, and this policy.

Selection Criteria:

Materials are selected based on:

- Relevance to the interests and needs of the community
- Representation of diverse points of view
- Current or historical significance, or permanent value
- Accuracy and authoritativeness
- Local significance of the author or subject
- Price, format, durability, and ease of use
- Evaluations in professional review sources
- Popular demand and community requests
- Relationship to the existing collection's strengths and gaps
- Availability through other libraries or networks

A selected item need not meet all criteria.

Acquisition Methods:

Materials are acquired from reputable library vendors, publishers, and distributors. Self-published works are evaluated using the same criteria as other materials.

Gifts & Donations:

The library gratefully accepts donations in accordance with its Donation Policy. All donations are evaluated using the same selection criteria as purchased materials. The library retains the right to decide

the final disposition of donated items. Memorial book plates may be added upon request. The library does not evaluate or appraise gift/donation materials for tax purposes.

Collection Maintenance & Weeding:

To ensure a current, relevant, and accessible collection, materials are regularly evaluated and withdrawn based on:

- Physical condition
- Currency of information
- Relevance to community interests
- Circulation and usage statistics
- Availability elsewhere

Weeding is conducted in accordance with professional standards, including the CREW: A Weeding Manual for Modern Libraries. Withdrawn materials may be sold, donated, recycled, or discarded.

Access & Parental Responsibility:

The library provides unrestricted access to materials for all users. Parents and guardians are responsible for monitoring their children's library use. Library staff do not serve in loco parentis (in place of parents) and will not restrict access based on age or content.

Requests for Reconsideration:

Residents within the library's service area may request the reconsideration of library materials. Requests must be submitted in writing using the Library's Request for Reconsideration Form. Materials under review will remain in the collection during the reconsideration process.

Policy Review:

This policy is reviewed periodically by the Library Director and Board of Trustees to ensure it remains current and responsive to community needs.

Request for Reconsideration of Library Materials Policy

Purpose:

The Belmont Literary and Historical Society Free Library is dedicated to providing free and equal access to a diverse collection of materials that support the educational, informational, and recreational needs of the community. While the inclusion of an item in the collection does not imply the Library's endorsement of its content, the Library acknowledges that community members may occasionally object to specific materials. This policy provides a structured process for individuals to request the reconsideration of library materials.

Eligibility to Submit a Request:

Requests for reconsideration may only be submitted by individuals residing within the Library's service area who hold a library card in good standing. Each individual may submit a maximum of three (3) requests for reconsideration per calendar year. A specific title, regardless of format (e.g., print, eBook, audiobook, etc.), may not be challenged more than once every three (3) years.

Guiding Principles:

The Belmont Literary and Historical Society Free Library affirms the American Library Association's Library Bill of Rights, Freedom to Read Statement, and Freedom to View Statement. Materials will not be automatically removed from the collection or restricted based solely on a request for reconsideration. Materials under review will remain available to the public throughout the reconsideration process.

Reconsideration Process:

1. Individuals requesting reconsideration must complete a Request for Reconsideration Form, available at the library or on the library's website. The completed form must be submitted to the Library Director.
2. Upon receipt of the completed form, the Library Director will acknowledge the request and conduct an initial review based on the Library's Collection Development Policy.
3. Within fourteen (14) days of receiving the request, the Library Director and Board President will review the material and determine if further review is warranted.
4. The Library Director will issue a written decision to the requester, summarizing the findings, within ten (10) days after the review is completed. This decision will be sent via certified mail. A copy of the decision will also be provided to the Board of Trustees.

Appeal Process:

1. If the requester is dissatisfied with the Committee's decision, they may submit a written appeal to the President of the Board of Trustees.
2. The Board of Trustees will review the appeal at its next scheduled meeting or at a special meeting, if deemed necessary.

3. The Board's decision will be communicated to the requester in writing.
4. If the requester remains unsatisfied, a final appeal may be made to the Commissioner of Education in Albany, New York.

Evaluation of Standards:

Evaluation of library materials will be based on the work as a whole, not on isolated passages. The library will not redact, modify, or remove portions of any material under consideration.

Final Authority:

Final responsibility for all library policies lies with the Board of Trustees. Implementation of this policy and day-to-day collection development decisions rest with the Library Director.

References:

- American Library Association Library Bill of Rights:
<https://www.ala.org/advocacy/intfreedom/librarybill>
- Freedom to Read Statement: <https://www.ala.org/advocacy/intfreedom/freedomreadstatement>
- Freedom to View Statement:
<https://www.ala.org/rt/vrt/professionalresources/vrtresources/freedomtoview>
- Code of Ethics: <https://www.ala.org/tools/ethics>

Belmont Literary and Historical Society Free Library Request for Reconsideration Form

Introduction:

This form is in reference to the Request for Reconsideration of Library Materials Policy and is for residents who wish to request a review of an item in the library's collection. Requests will only be accepted from library cardholders in good standing that reside in the library's service area.

The Belmont Literary and Historical Society Free Library supports the right to access a broad range of ideas and information. The library will not process requests, and the library board will not hear reconsideration requests from individuals who reside outside the library's service area. Materials will remain available during the review process.

Please fill out the form completely and return to:

Belmont Literary and Historical Society Free Library
C/O Library Director
2 Willets Ave
Belmont, NY 14813

Date: _____ Name: _____
Address: _____ City, State, ZIP Code: _____
Phone Number: _____ Email Address: _____
Library Card Number: _____

Material Information

Title: _____ Author/Creator: _____
Format (e.g., Book, eBook, DVD, Audiobook, etc.): _____

Have you read the Belmont Literary and Historical Society Free Library Reconsideration Policy?

Yes _____ No _____

Do you represent: Yourself? _____ An Organization? _____

What brought this title to your attention?

Did you read, view, or listen to the entire work? If no, what parts?

What do you believe is the topic or theme of this title?

What specifically concerns you about this title? Please cite pages, items etc.

Are there, in your judgment, any positive elements in this title? Please describe:

Are there resources you suggest providing additional information and/or viewpoints on this topic?

What action would you like the Library to consider regarding this material?

____ Removal from the collection ____ Relocation to a different section ____ Other (please specify):

Signature: _____

*******Library Use Only*******

Date request received: _____

Review Start Date: _____

Review Completion Date: _____

Submitted to ALA/NYLA on: _____

Reconsideration action:

Date response sent to patron: _____

Library Sponsored Program Policy

Mission

The Belmont Literary and Historical Society Free Library is a cornerstone of community connection, knowledge, and opportunity. We strive to provide free and open access to resources, technology, and services that empower individuals and strengthen our community. As a safe and inclusive space, we foster learning, creativity, and social acceptance. Through collaboration with local organizations, schools, and other libraries, we work to enrich lives, promote literacy, and encourage civic engagement. Together, we aim to recalibrate our community by inspiring lifelong learning and meaningful connections for all.

Vision

Library programming is one of the many ways we carry out our mission—offering shared experiences that ignite curiosity, celebrate diversity, and encourage deeper connection to each other and the world around us.

Guidelines

The Belmont Library supports its mission through thoughtfully developed programming that:

- Supplements and extends the information found in the library's collection
- Encourages discovery and learning through alternative formats
- Promotes awareness and use of library materials and services
- Build partnerships and strengthen the community fabric
- Creates accessible, welcoming, and inclusive opportunities for engagement

Program topics, presenters, formats, and materials are selected by library staff based on community needs and interests. Additional considerations include budget, staff capacity, scheduling, and alignment with strategic goals.

All library-sponsored programs are open to the public. Some may be designed with specific audiences in mind, such as children, teens, or seniors. Programs may be led by library staff or offered in partnership with community organizations, educators, or local experts.

Registration may be required for planning purposes. Registrant information is kept confidential and used solely for program-related communication. Most library programs are free to attend; however, a small fee may occasionally be charged to cover materials. Programs may be held at the library or off-site locations.

Any sales occurring at library programs must be pre-approved by the Library Board and must benefit the library directly.

The Belmont Library does not exclude program topics, speakers, or materials on the basis of potential controversy. Hosting a program does not constitute an endorsement by the library, its staff, or board. Programs of a primarily commercial or religious nature are not permitted.

Questions or concerns about library-sponsored programming should be directed to the Library Director. Formal objections will be addressed through the library's **Request for Reconsideration of Materials and Programs** procedure.

Confidentiality of Library Records Policy

Confidentiality of library records is essential to uphold the First Amendment rights of our patrons and to protect their privacy. Libraries serve as pillars of democracy by ensuring unrestricted access to information. Without confidentiality, the freedom to explore ideas and access information is compromised.

In accordance with New York State Law and the fundamental values of librarianship, the library will maintain the confidentiality of all library records and patron inquiries, regardless of their age.

To ensure that all individuals feel free to utilize library resources without fear of exposure, the Belmont Literary & Historical Society Free Library Board of Trustees has adopted the following confidentiality guidelines:

No information regarding or including, but not limited to:

- A patron's name (or whether an individual is a registered borrower or has been),
- A patron's address,
- A patron's phone number,
- A patron's borrowing records,
- The number or nature of inquiries made by a patron,
- The frequency or content of a patron's lawful visits to the library,
- Or any other information supplied to or collected by the library

shall be disclosed to any individual, organization, corporation, institution, government agency, or other entity without a valid legal process, court order, or subpoena.

If such a legal request is presented, the library will take appropriate steps to ensure compliance with legal requirements while also protecting patron confidentiality to the fullest extent possible. The library will resist enforcement of any legal request until a proper demonstration of good cause is made in a court of competent jurisdiction. If the request does not meet legal standards, the library will seek to have any deficiencies corrected before releasing any records.

Retention of Patron Registration Forms

Patron registration forms will be retained for a period of six (6) months from the date of registration in accordance with the library's records management policy. After this period, registration forms will be securely disposed of to maintain patron privacy and data security.

This policy affirms our commitment to patron privacy and intellectual freedom, ensuring a safe and open environment for information access.

Record Retention and Destruction Policy

Purpose

The purpose of this Policy is to ensure that necessary records and documents are adequately protected and maintained, while ensuring that records that are no longer needed or are of no value are properly discarded in a timely and efficient manner. This policy applies to both physical and electronic records, including emails, web files, text files, sound and video files, PDFs, and documents created in any Microsoft Office or other compatible formats.

Policy

This Policy outlines the Belmont Literary and Historical Society Free Library's approach to retaining and disposing of records, both physical and electronic. It is designed to provide clear guidance to all employees about how long different types of records must be retained and when they should be destroyed.

The Library Director (the "Administrator") is the officer responsible for administering this policy and overseeing the implementation of processes to ensure compliance. The Administrator is also authorized to modify the Record Retention Schedule from time to time to remain compliant with applicable local, state, and federal laws. Additionally, the Administrator shall monitor legal requirements concerning record retention, review the policy annually, and oversee overall compliance.

In the event that the Belmont Literary and Historical Society Free Library is served with a subpoena or involved in a legal matter, employees must immediately inform the Administrator, and the disposal of records must be suspended until further instructions are given. The Administrator, in consultation with legal counsel, will determine how to proceed.

This policy applies to all physical records generated during the operation of the Belmont Literary and Historical Society Free Library, including originals and copies. It also applies to electronic records and documents.

Appendix A - Record Retention Schedule

The Record Retention Schedule categorizes and details retention periods for different types of records. Below are the sections of this schedule:

Record Type	Retention Period	Notes
Accounting and Finance		
Accounts Payable Ledgers & Schedules	7 years	
Accounts Receivable Ledgers & Schedules	7 years	
Audit Reports & Financial Statements	Permanently	
Audit Records (including work papers)	7 years after completion of audit	
Bank Statements & Canceled Checks	7 years	
Employee Expense Reports	7 years	
General Ledgers	Permanently	

Investment Records	7 years after sale of investment	
Credit Card Records (documents showing customer credit card number)	2 years	
Contracts		
Contracts & Related Correspondence	7 years after expiration or termination	
Corporate Records		
Corporate Records (minute books, signed minutes, articles of incorporation, bylaws, annual corporate reports)	Permanently	
Licenses & Permits	Permanently	
Correspondence & Internal Memoranda		
Routine Correspondence & Memoranda	2 years	
Non-Routine Correspondence (significant)	Permanently	
Electronic Documents		
Emails	12 months	Unless related to business matters, then retain.
Grant Records		
Original Grant Proposal	7 years after grant completion	
Grant Agreement & Modifications	7 years after grant completion	
Final Grantee Reports	7 years after grant completion	
Insurance Records		
Annual Loss Summaries	10 years	
Claims Files (including medical records, injury documentation)	Permanently	
Insurance Policies (including expired policies)	Permanently	
Legal Files & Papers		
Legal Memoranda & Opinions	7 years after matter concludes	
Litigation Files	1 year after expiration of appeals or time for filing appeals	

Court Orders	Permanently	
Miscellaneous		
Consultant's Reports	2 years	
Material of Historical Value	Permanently	
Annual Reports	Permanently	
Payroll Documents		
Employee Deduction Authorizations	4 years after termination	
Payroll Deductions	7 years after termination	
W-2 & W-4 Forms	7 years after termination	
Time Cards/Sheets	2 years	
Personnel Records		
Employee Personnel Records	6 years after separation	
Employment Contracts	7 years after separation	
Property Records		
Property Deeds, Assessments, Licenses, Rights of Way	Permanently	
Tax Records		
Tax-Exemption Documents & Related Correspondence	Permanently	
Sales/Use Tax Records	7 years	
Tax Returns (Income, Franchise, Property)	Permanently	
Contribution Records		
Records of Contributions	Permanently	
Programs & Services Records		
Library Program & Service Records	7 years	
Conventions and Events	Permanently	1 copy only
Fiscal Sponsor Project Records		
Sponsorship Agreements	Permanently	

Library Code of Conduct/Patron Behavior Policy

Introduction:

To ensure a welcoming, safe, secure, and enjoyable environment where all individuals are entitled to use the facility and library services, the Belmont Literary & Historical Society Free Library staff shall enforce the following Library Code of Conduct Policy.

This policy applies to all library property, including inside the building and outdoor areas. The library is considered a limited public forum.

Patrons are expected to respect each other, library personnel, and library property. To maintain a welcoming and safe environment:

- No person shall commit or attempt to commit any activity that constitutes a violation of federal, state, or local law.
- No person shall engage in disruptive, disorderly, or unsafe conduct. Threatening behavior and destruction of property will not be tolerated.
- Young children (ages five and under) must be supervised at all times by a caregiver or parent. Children under the age of 10 must be accompanied by a caregiver or parent. Library staff cannot legally assume the role of caregiver.

Examples of Inappropriate Conduct:

Minor Offenses:

- Using the library as a place for extended sleep.
- Excessive and disruptive conversations.
- Beverages must be covered, and food must be eaten only in designated areas.
- Using materials for purposes other than reading, research, viewing, or listening.
- Unauthorized canvassing, selling, soliciting, or engaging in commercial activity.
- Smoking, vaping, chewing tobacco, or gambling.
- Littering or improper waste disposal.
- Entering the library without proper footwear or clothing, including a shirt.
- Having bodily hygiene that is offensive or creates a biohazard.
- Audible cell phone usage is allowed only in designated areas. Please be respectful of those around you.
- Using skates, skateboards, or scooters in the library.
- Improper use of computers. (See the Computer & Internet Use Policy.)
- Bringing in animals, except for trained service animals. Service animals must be under control at all times. Staff may ask if the animal is required due to a disability and what task it has been trained to perform.

- Other activities inconsistent with reading, studying, and use of library materials.

Major Offenses:

- Stealing or damaging library property.
- Committing any crime, misdemeanor, or violation of municipal ordinances.
- Harassing or threatening behavior toward patrons, staff, or volunteers, including stalking.
- Using library materials or equipment in inappropriate or illegal ways, such as accessing pornographic materials or printing copyrighted content.
- Fighting or challenging others to fight.
- Carrying weapons of any kind.
- Consuming alcoholic beverages or using illegal substances on library premises.
- Being under the influence of drugs or alcohol in a manner that disrupts library use.
- Knowingly entering non-public areas without permission.
- Defacing library property, including desks, restrooms, and walls.

Loss of Library Privileges & Enforcement:

Engaging in prohibited behaviors may result in one or more of the following consequences, at the discretion of the Library Director, depending on the severity of the violation. Patrons suspended from the library for more than one day may petition to have their suspension reviewed by the Director and, if necessary, by the Library Board of Trustees. If a patron is banned, a copy of the Banned Patron Form will be provided to the individual and local law enforcement.

Treatment of Minor Offenses:

- First infraction: Verbal warning and a copy of the Library Code of Conduct Policy provided.
- Second infraction: Removal from the library for the day.
- Third and subsequent infractions: Banning from the library premises for one week.

Treatment of Major Offenses:

Any patron committing a major offense will be immediately removed from the premises. Depending on the nature of the offense, the extent of damage or disruption caused, and any prior infractions, the patron may be banned for up to 12 months at the discretion of the Director or designee.

Appeals:

Any patron subjected to enforcement of this policy may file a written complaint with the Director within five days of the disputed action. The Director will review the complaint and provide a written response within five business days. If the patron requests a review by the Library Board of Trustees, the Director will submit all relevant information within five business days. The Board will review the complaint at their next scheduled meeting and provide a written response within five business days of that meeting.

The Belmont Literary & Historical Society Free Library Banned Patron Form

When possible, a copy of this form will be given to the patron, the Library Director, and local law enforcement.

Date: _____

Time: _____

Completed by Staff Member: _____

Location of Incident: _____

Date of Occurrence: _____

Name of Person(s) Involved: _____

Address/Phone: _____

Description of the Offense: _____

Were the police contacted? (Y/N): _____

Officer's Name and Badge Number: _____

Is the patron banned? (If yes, add start and end date): _____

Director/Designee Signature: _____

Letter to Patron/Banned Form

This letter should be completed on library letterhead and sent to the patron's mailing address along with the dated and signed Banned Patron Form.

Belmont Literary & Historical Society Free Library
2 Willets Street
Belmont, NY 14813

{Date}

{Patron Name}

{Patron Full Address}

Subject: Notice of Library Patron Ban

Dear {Patron Name},

This letter serves to inform you that your library privileges at the Belmont Literary & Historical Society Free Library have been revoked, effective immediately, due to violating of our library policies, including {list specific violations, such as disruptive behavior, damage to property etc}.

Specifically, on {date}, you were observed {describe violation}, and on {date}, you {describe another violation}.

As a result of these actions, your access to the library will be suspended for a period of {duration of ban}.

If you wish to appeal this decision, please submit a written request to Erica Moses within 5 days of receiving this letter.

Sincerely,

Erica L Moses
Library Director
Belmont Literary & Historical
Society Free Library

Obtaining a Library Card

Library cards are available at no charge to individuals over the age of five who meet the following requirements:

- Applicants must apply in person.
- A government-issued photo ID is required. If unavailable, any photo ID plus a document (e.g., utility bill) showing the applicant's name and current address is acceptable.
- Applicants aged 5-12 require a parent or legal guardian as a co-registrant.
- Applicants aged 12-18 may use a student ID if they do not have a state-issued ID.

If you have a library card with another participating STLS library, then you do not need a card specific to the Belmont Literary and Historical Society Free Library.

Library cards are valid for one year and must be renewed annually. Replacement cards are available for a \$5 fee.

Registration forms are retained for six months and disposed of according to the library's records retention policy.

Using a Library Card

The Belmont Literary and Historical Society Free Library is not responsible for library cards used by unauthorized persons. It is the responsibility of the user to take care of their library card.

If your library card is lost, please notify the library immediately. There is a one-week waiting period from the date we are notified until the new card may be issued. The replacement charge for a lost, damaged or destroyed card is \$5.00.

If you plan to leave the area, please turn in your library card.

Renewals may be made by phone if an overdue notice has not been sent. Newer recorded materials and interlibrary loans cannot be renewed.

A book drop is available near the entrance of the library for use when the library is closed.

Where can I use my card?

You may use your Belmont Literary and Historical Society Free Library card at most public libraries in Allegany, Steuben, Chemung, Schuylers, and Yates counties. Please check with each library about borrowing privileges; policies may vary.

Circulation/Lending Policy

Library cards must be presented to check out materials.

New materials may only be borrowed for 2 weeks

DVD's may be borrowed for 2 weeks

Most other materials may be borrowed for 4 weeks

All items may be renewed once as long as they are not on the holds list.

Materials not owned by the Belmont Literary and Historical Society Free Library may be loaned from other libraries within the Southern Tier Library System.

Materials may be renewed in person, by phone, or through StarCat.

New Patrons

New patrons are limited to borrowing two items at a time until a good lending history has been established.

Reserved Books (Placing a Hold on an item):

You can place a hold by:

- Calling or visiting the library and speak with staff.
- Request items online via StarCat. You can request multiple items at the same time by first adding your items to a list.

Items not directly owned by the Belmont Literary and Historical Society Free Library come from other libraries throughout the Southern Tier Library System.

Library staff will pull the hold list each day the library is open. Once the hold is pulled, the patron will be notified by their preferred method. If the patron does not pick up their items within one week, the items will be returned to the shelf.

Fines and Fees and Overdue Materials:

The Belmont Literary and Historical Society Free Library is fine free. Fines will not be charged for late items only.

If an email address is on file, notices will be sent to the patron the day before the item's due date. An automatic renewal notice will be sent on the due date, letting you know if the item was renewed. Overdue notices will be sent at seven (7), and fourteen (14) days overdue.

If materials are not returned after 30 days overdue, the patron account is suspended, and a letter will be mailed to the patron.

A Final Notice that includes a bill for items is mailed when items are out more than 60 days. If materials are not returned, the local police are notified, who then contact the individual to return the items.

Damaged Items:

Patrons are responsible for the care of library materials in their possession. Items deemed to be damaged beyond repair will be billed to the patrons account as a replacement charge. The replacement charge will be for the current cost of the item, as well as a \$3 fee to cover re-cataloging, processing, and barcodes. The item must be paid for before borrowing privileges are restored. Replacement items will only be except if they are the same format and edition of the damaged item and upon approval of the Library Director.

Lost Materials:

Library materials that are lost or remain unreturned after six (6) weeks from the due date will be considered lost and a replacement charge for the item will be billed to the patron's account. The replacement charge will be for the current cost of the item, as well as a \$3 fee to cover re-cataloging, processing, and barcodes. The item must be paid for before borrowing privileges are restored. Replacement items will not be accepted.

Renewing Items:

Most items may be renewed once for the current loan period associated with the material borrowed. Additional renewals will be subject to the librarian's discretion. Patrons with a current email address attached to their library accounts will receive a courtesy notice 1 (one) day before their item is due. Patrons are responsible for returning their items by the due dates.

Patrons who do not have an email address attached to their library account will not receive a notification and are responsible for returning their items by the due dates.

Confidentiality:

To protect your privacy and in accordance with our privacy and confidentiality policy, we cannot discuss your library account with any persons. If you wish another person to pick up your reserved items, a request must be made in writing at the library. Said person(s) will not have access to view your account and will not be able to check out anything other than your reserved items. If you need to discuss your account by phone, you will be asked to provide your library card number and verify your address and/or other information.

Computer and Internet Use Policy

Introduction:

The Belmont Literary and Historical Society Free Library provides computer and internet access to support research, education, and informational needs. The internet is an evolving and largely unregulated resource, and the library does not assume responsibility for the accuracy, reliability, or appropriateness of information found online. Users are responsible for evaluating the content they access.

User Rights and Privacy:

The library respects users' rights to privacy and confidentiality. However, users should be aware that the internet is not a secure medium, and online transactions or communications may be accessed by third parties. The library will not release information about individual usage except as required by law. Library computers are equipped with a content filter that blocks access to materials deemed obscene, child pornography, or harmful to minors as mandated by the Children's Internet Protection Act (CIPA). Users seeking unfiltered access may request assistance from library staff where permissible by law.

Access by Minors:

The library affirms the responsibility of parents and guardians in guiding their children's internet use. While the library provides filtering and educational resources, it does not monitor or control children's internet activity. Parents are encouraged to discuss online safety with their children, including:

- Avoiding the disclosure of personal information such as addresses, phone numbers, and school details.
- Not engaging in online conversations or meetings with strangers.
- Reporting any inappropriate or threatening online communications to a parent, guardian, or library staff member.
- Recognizing that not all online information is accurate or reliable.

Prohibited Activities:

All users must adhere to legal and ethical standards when using library computers and the internet. The following activities are strictly prohibited:

- Viewing or distributing pornography, child exploitation materials, or obscene content.
- Engaging in illegal activities, including fraud, hacking, and unauthorized system access.
- Harassing, stalking, or invading the privacy of others.
- Violating copyright laws, including unauthorized downloading or distribution of copyrighted materials.
- Using the library's network for commercial, political, or personal business purposes.
- Sending spam, phishing attempts, or unsolicited advertising.

Usage Guidelines:

- Computer usage is free to the public and does not require a library card
- Users under the age of 12 must have a parent or guardian present while using the computers.
- Computers are available on a first-come, first-served basis and sessions are limited to 60 minutes with a maximum of two sessions per 24-hour period. Users can request an extension of time if no other user is waiting.
- Users who wish to use audio content on library computers must wear headphones or earbuds.
- No food or drink is allowed near the computers
- Users may not load programs onto the library computer hard drives or download/run unapproved programs from any device.
- Downloads should be saved to personal storage devices, as all saved files are erased from public computers at the end of each day.
- The library is not responsible for damage, loss of data, or any liability that may occur from a user use of library computers or internet.
- Library staff can provide limited technical support but cannot offer extensive computer training or troubleshooting beyond basic assistance. For liability reasons staff cannot answer questions of a financial, legal, or medical nature. Staff may not fill out online forms on a user's behalf.
- Users must agree to the library's internet use terms before accessing the wireless network. Unauthorized network use or security violations will result in suspension of access.

Fees:

- Black and white prints: \$0.25 per page
- Color prints: \$1.00 per page
- Fax: \$2.00 per fax

Failure to comply with this policy may result in the suspension or termination of computer and internet privileges. Violations involving illegal activities may be reported to law enforcement. Parents of minors will be notified of infractions. Users are responsible for any damage resulting from misuse of library computers or networks.

By using the library's computers and internet services, patrons agree to abide by these policies and procedures. The library reserves the right to update this policy as needed to ensure a safe and effective computing environment for all users.

Library Materials Donation Policy

If you would like to donate items, please do so during open hours by bringing them inside. Donations are not to be left inside the book drop.

The Belmont Literary and Historical Society Free Library reserves the right to determine the outcome of all materials donated/received. The staff will use its best professional judgement, taking into consideration the same standards they apply to purchased materials. Donated items should only be those which other patrons would be interested in (i.e.: old textbooks, manuals, torn or items in poor condition, etc., will not be accepted.)

Donated materials added to the library collection will be classed and arranged at the discretion of the library and are subject to the current library retention policy and procedure. The donor may not restrict access to, use of, or placement of donated materials.

The Belmont Literary and Historical Society Free Library does not provide appraisal services, recommend professional appraisers, suggest value, or provide a list of donated materials.

We DO NOT accept:

- Shipped items
- VHS or Cassette Tapes
- Reader's Digest Condense Books
- Items that are Moldy/Musty/Soiled
- Damaged Items

Certain materials greater than five (5) years old that will NOT be accepted:

- Encyclopedia
- Textbooks
- Travel
- Health Care/Medical
- Computer
- Financial/Legal

We thank you for your donations and observing our guidelines.

Donation receipts are available upon request.

Donation Receipt

Date of Donation: _____

Name of Donor: _____

Donor Address: _____

Thank you for your generous donation. This receipt serves as acknowledgement of your donation of the items listed below to the Belmont Literary and Historical Society Free Library at 2 Willets Ave Belmont NY. Contributions of goods are deductible for Income Tax purposes to the extent allowed by law. Estimating the fair market value of in-kind donations is the privilege and responsibility of the donor. The Belmont Literary and Historical Society Free Library provided no goods or services in consideration of this donation.

Item(s) Donated:

Received by: _____ Title: _____

Photography and Videography Policy

Purpose

This policy is intended to protect the privacy and safety of patrons, maintain an environment conducive to library use, and outline appropriate use of photography and videography in library spaces.

Library-Initiated Photography and Video

Library staff may take photographs or video footage during programs, events, or general library activities for the purposes of:

- Marketing and promotion (e.g., social media, newsletters, website, or print materials)
- Grant reporting or advocacy

Signage will be posted in public areas during any event or program where photography or video recording may occur. Attendance at these events implies consent to be photographed unless an **opt-out form** is submitted in advance.

Parents or guardians may complete an opt-out form on behalf of minors. Reasonable effort will be made to exclude individuals who opt out of being recorded or photographed.

Public and Press Photography

Individuals wishing to take photographs or videos in the library must:

- Receive **prior approval** from the Library Director or their designee
- Refrain from photographing or filming other patrons or staff without their explicit permission
- Not disrupt library services, programming, or other patrons' use of the space

Requests from **media outlets** must be directed to the Library Director and approved before any interviews, filming, or photos may occur on-site.

Prohibited Uses

Photography and videography for the following purposes are **not permitted**:

- Commercial use or monetized content creation (e.g., TikTok videos, product promotion)
- Staged videos or photos that misrepresent the library, its services, or collections
- Any use that involves defacing, damaging, or removing materials from shelves

Violations may result in expulsion from the library and/or loss of library privileges.

Security Cameras (For Future Implementation)

If installed, exterior security cameras will be used solely for **safety and security**. The library will comply with all applicable laws regarding surveillance and privacy.

Review and Enforcement

This policy will be reviewed every three years or sooner if community use patterns or technology changes significantly. The Library Director or their designee reserves the right to stop any photography or videography deemed disruptive or inappropriate at any time.

Belmont Literary and Historical Society Free Library

Photo & Video Opt-Out Form

The library often photographs and records programs and events to promote its services and share our impact with the community through social media, newsletters, printed materials, and grant reporting.

If you do not wish to be photographed or recorded, please complete this form and return it to the Library Director or front desk staff.

☐ I DO NOT consent to be photographed or recorded while at the library.

This includes photo or video documentation during public programs, events, and general library use.

Name: _____

Phone or Email (optional): _____

Signature: _____

Date: _____

If you are submitting this form on behalf of a minor, please complete the following:

Child's Full Name: _____

Child's Age: _____

☐ I am the parent or legal guardian of the child named above and do not consent to their image being used in library media.

Parent/Guardian Name: _____

Signature: _____

Date: _____

NOTE:

The library will make every reasonable effort to exclude individuals who have opted out from photographs or recordings. However, submission of this form does not guarantee complete exclusion, especially in large group settings.

Questions? Please contact the Library Director at 585-268-5308 or belmont@stil.org

Community Room/Meeting Space Use Policy

The Belmont Literary and Historical Society Free Library's meeting space shall be available to groups provided their intended use complies with the operational rules, safety codes, and behavior policies as determined by the Board of Trustees. These policies can be found online on our website and a hard copy can be provided. Priority is given to library activities and library-related use. When the meeting space is available, activities sponsored by the Belmont Literary and Historical Society Free Library will be given priority. Further use of the meeting room is determined on a first-come, first-served basis.

Requirements for Meeting Space Use:

1. Meeting Space Etiquette:
 - a. Meetings should cause no interruption or inconvenience to ongoing library activities.
 - b. Use of the meeting space does not imply endorsement by the library, staff, or Board of Trustees. Any public advertisement, flyers, or social posts for the event must include the statement: "This event is not sponsored or endorsed by the Belmont Literary and Historical Society Free Library, its staff, or its board."
2. Priority Use and Application:
 - a. Application for the use of the meeting space must be made at least two weeks in advance by an individual over 18 who will be responsible for ensuring adherence to the rules and regulations.
 - b. The person filling out and signing the application form is considered the responsible party for the event.
 - c. The Board of Trustees reserves the right to limit organizations which hold periodic meetings to encourage broad use of the space.
 - d. Recurring Events (e.g., Book Clubs or Community Groups):
Groups requesting recurring use of the meeting space (monthly, bi-weekly, etc.) must submit a completed application every six months, listing all intended dates. This ensures equitable access for all community members and helps the library maintain an up-to-date schedule.
3. Maximum Capacity:
 - a. The meeting space shall not exceed 75 people in compliance with code enforcement standards. This capacity must be strictly observed.
4. Use Fees, Donations, and Cleaning Deposit:

The library uses a tiered structure for meeting room use to support equitable access and maintenance:

- Non-Profits/Civic & Community Groups (Examples include: 501(c)(3) charities, book clubs, historical societies, local scout troops, religious groups, and grassroots community organizations. Note: events in this tier **must be open to any member of the public**. Meetings that restrict attendance to specific members or invitees only will be classified and billed as Private Events)

- During Library Hours: No Charge
- Outside of Library Hours: \$50 suggested donation
- Private Events/Non-Commercial Forums (Examples include: Private birthday parties, family reunions, political candidate town halls, partisan committee meetings, and/or public debates):
 - During Library Hours: \$50 use fee
 - Outside of Library Hours: \$100 use fee + \$50 refundable cleaning deposit
- For-Profit Businesses/Commercial Activities (Examples Include: Staff meetings/Trainings, independent consultants hosting paid seminars, commercial entities presenting sales pitches, or any event where goods/services are actively sold):
 - During Library Hours: \$50 use fee
 - Outside Library Hours: \$100 use fee + \$50 refundable cleaning deposit

Terms and Conditions:

- a. All fees are due 7 days prior to the event. The \$50 cleaning deposit is refundable upon inspection, provided all cleaning requirements are met.
- b. The library reserves the right to levy additional fees or cleanup charges solely based on documented staff time, actual damages, or failure to comply with the cleaning checklist.
- c. Fee Exemption Policy: Fees are applied uniformly based on the categories above. The Director or Library Board of Trustees may waive fees only for events that are officially co-sponsored by the library or emergencies resulting in facility closure.
- d. Non-Endorsement: Use of the library space by any group or individual does not constitute an endorsement of their beliefs, policies, or political candidacies by the library, library staff or library board members.

5. Room Condition & Cleaning:

- a. The room must be cleaned and left in the condition it was found.
- b. All garbage must be emptied and removed by the group after the event.
- c. The room's floors, tables, chairs, and counters should be wiped down.
- d. Care must be taken with the beautiful wood floors. They should be protected from scratches or damage at all times. Chairs with rubber protectors on the bottom should be used to avoid any floor damage. Do not tip and drag chairs across the floor.

6. Smoking & Alcohol Policy:

- a. Smoking, including vaping, is strictly prohibited in the community/meeting room and all library areas.
- b. Alcohol is also prohibited. This includes both consumption and distribution.

7. Cancellations:

- a. The library must be notified promptly of any cancellations. Failure to notify the library of a cancellation at least 48 hours in advance twice within a 6-month period will result in a 3 month suspension of room privileges.

8. Supervision for Youth Groups:

- a. For groups with members under age 18, a responsible adult must fill out the application and be present for the duration of the event. Adequate adult supervision must be provided.
9. Liability for Damages:
 - a. Groups are financially responsible for any damage that occurs during their use of the meeting space, including its furnishings and equipment. If access to the meeting space involves use of the main floor of the library (e.g., via the accessible ramp), groups are also responsible for any damage to the library and its contents during that time. This includes any additional cleaning required as a result of their use.
 - b. By using the meeting room, the individual or organization agrees to hold harmless the Belmont Literary and Historical Society Free Library, its officers, agents, board members, and employees from any and all claims, suits, damages, losses, or expenses—including legal fees—arising from their use of the space.
10. Right to Cancel or Suspend Usage:
 - a. The Board of Trustees reserves the right to cancel or suspend any permission granted to a group or organization that violates the rules and regulations of the meeting space or library.
11. Key Pickup:
 - a. Keys for the meeting room can be picked up any time the library is open, within 7 days of the scheduled event, unless another event is being held during those 7 days.
 - b. Keys only grant access to the lobby, stairs, and community/meeting room. The main library remains off-limits after hours. Unauthorized entry or attempts to access the main library area will result in an immediate, permanent ban from the facility and forfeiture of the cleaning deposit.
 - c. Keys must be returned to library staff, or deposited in the library book drop, within 24 hours of the event's conclusion. A fee of \$25 will be assessed for any lost or unreturned keys.

Updated 8/20/2026

Community Room Meeting Space Agreement Form

Event Information:

Event Name: _____

Is this a recurring event? ☐ No ☐ Yes

Date of Event: _____

(For recurring use, list all known dates within a 6-month period. A new form is required bi-annually.)

Time of Event: _____

Group Classification (Please check one):

☐ Non-Profit/Civic & Community Groups**

☐ Private Event/Non-Commercial Forum

☐ For-Profit Business/Commercial Activities

**Note: If this box is checked, your event must remain free and open to any member of the public. Events restricting attendance are classified as Private Events.

Contact Information:

Organizer Name: _____ Phone: _____

Email: _____ Mailing Address: _____

Acknowledgements:

I, the undersigned, acknowledge that I have received, read, and agree to comply with the Community Room Meeting Space Use Policy. I understand that failure to follow the policy may result in denied or revoked access. I agree to be personally responsible for any damages or cleaning required beyond standard use, and I understand that use of the space does not imply Library sponsorship.

I further agree to hold harmless the Belmont Literary and Historical Society Free Library, its officers, agents, and employees from any and all claims related to this event.

Signature: _____ Date: _____

Print Name: _____

***** FOR STAFF USE *****

Application Received: _____ Staff Initials: _____

Keys Picked Up: _____ Pickup Person's Signature: _____

Keys Returned: _____ Staff Initials: _____

Cleaning Deposit Returned (if applicable): _____ Staff Initials: _____

Staff Initials: _____

Display Areas and Bulletin Boards

Purpose: To manage and maintain the appearance and functionality of the Belmont Literary and Historical Society Free Library's display area and bulletin boards, as well as to ensure equitable access for community information while upholding the Library's standards.

Approval and Placement:

1. Approval Process:
 - a. All materials intended for display or posting must be approved by the Library Director.
 - b. Materials must be submitted in a physical format. Digital items will not be accepted.
2. Priority:
 - a. Display space will be allocated based on the following priority:
 - b. Belmont Free Library events and information
 - c. Belmont and Amity events and information
 - d. Non-Profit organizations and events in Belmont, Amity or nearby communities
 - e. Educational or cultural events of interest to library users
 - f. Fundraisers for non-profit organizations that do not compete directly with Library or Township fundraisers
 - g. Free local newspapers
 - h. For-profit educational or cultural events deemed useful for library users.

Display Areas and Content:

1. Designated Spaces:
 - a. Materials must be displayed only in the designated areas.
 - b. Posting on painted surfaces, furniture, or the building's exterior is prohibited.
2. Criteria for Posting:
 - a. All signs and materials must be legible, in good condition, and include the name and contact information of the responsible individual or organization.
 - b. Acceptance of materials does not imply endorsement by the Library.
 - c. Materials must be no larger than 8.5" x 11" in size.
 - d. Materials may be displayed for a maximum of 4 weeks or until the event has expired, depending on space availability.
3. Restrictions:
 - a. The Library will not post commercial advertisements, personal gain advertisements, campaign or political literature, or legal notices.
 - b. Job postings will be accepted on an occasional basis, as space allows, and show be relevant to public interest.
 - c. The teen and children's areas may display information related to juvenile services as long as they follow the same guidelines.

Policy Compliance:

1. Signage Management:

- a. All signage must be brought to the desk for approval. The library reserves the right to set time limits and remove any signs as needed.
- b. Signs must be removed by staff. Any individual posting materials are responsible for any damage or personal injury resulting from their postings.
- c. Unauthorized materials will be removed and disposed of by Library staff.

2. General Guidelines:

- a. Removal of signage by anyone other than library staff is prohibited.
- b. The Library reserves the right to dispose of unapproved materials and may establish time limits for displaying approved materials.

Implementation:

- This policy is subject to periodic review and updates by the Library Board.
- For questions or to submit materials for approval, please contact the Library Director.

Unattended Belongings and Packages Policy

To ensure the safety of all patrons and staff, the Belmont Literary and Historical Society Free Library monitors all unattended items left on library property or at library-sponsored events.

- Patrons are strongly discouraged from leaving personal items unattended.
- Unattended items may be removed or inspected at the discretion of library staff.

Procedures:

1. Staff will treat all unattended items with caution and will not open or disturb anything that appears suspicious or threatening.
2. If an item appears suspicious, staff will notify the Library Director and Board President and contact 911.
3. If the Director reasonably determines the item is safe, they may inspect it only to identify and contact the owner.
4. If the owner cannot be identified or does not return within 2 hours, the item will be moved to the library's Lost and Found.
5. Perishable items will be discarded. Sealed or solid food containers may be thrown away at staff discretion.

Unattended Minors Policy

Every effort is made to ensure the safety and comfort of patrons while at the library or during library sponsored events. The library does NOT provide supervision for unattended minors. Children may not be left unattended or left in the care of others who are unable or unwilling to provide adequate care.

Guidelines:

- Children under the age of 5 must be within line of sight and under active supervision of their parent/guardian.
- No one under the age of 12 may be left unattended in the library without a parent/guardian (at least 16 years of age) present in the building.
- Many children view the library as a safe and informative place and may visit during school hours. The library does not report children as truant, except in instances where staff are concerned about repetitive truancy, in which case, staff will follow reporter guidelines.
- Staff will attempt to notify the parent/guardian if:
 - The child is frightened or anxious while alone at the library
 - The child's health or safety may be in danger
 - The child's behavior disrupts other patrons or staff.

Closing Time Procedure:

- Unattended children, age 12 or younger, will be asked to contact their parent, guardian, or caregivers 15 minutes before closing time.
- If a parent, guardian, or caregiver cannot be reached or does not arrive by closing time, the child will be placed in the care of the New York State Police.
- At least one staff member will wait with the child until the New York State Police arrives. An incident report describing the situation will be filed the next day.
- After closing time, Library staff will leave a note on the Library door stating:

“Unattended child is in the custody of the New York State Police, please call the non-emergent line for Troop A at Phone no. (585) 344-6200.”

(Note: The child's name will not be listed on the sign.)

Inclement Weather & Emergency Closing Policy

The Belmont Literary and Historical Society Free Library is a public service organization and makes every reasonable effort to remain open during posted hours. The decision to close the library under adverse conditions will follow the following:

Directives issued by the national, state, or local governments

Inclement Weather:

As a rule, the library will remain open during most snow conditions. We use the Genesee Valley School District weather related closing and delays as a guide to make our decisions. If you hear that Genesee Valley schools are closed or delayed due to road conditions, please check the Library's Instagram and Facebook pages to see if we are open prior to your visit.

Generally, if we have heat, we do not close or delay due to extremely cold temperatures.

Decision for delays or library closing will be based on several factors that may include:

- Road conditions
- Projected forecast or worsening conditions
- Conditions of library walkways and parking
- A state of emergency for the immediate area declared by local, county, or state law enforcement agencies.

Power Outage:

If the building loses power, the emergency lighting system should activate. Staff will direct patrons to finish their transactions and exit the building. If emergency lighting does not activate, patrons will be asked to evacuate the building immediately. If power is not restored at the end of 60 minutes or the normal closing time (whichever comes first), the building should be closed and the Library Director as well the Library Board President should be notified.

The Library may re-open if it can be done safely and if power is restored at least 2 hours before the normal closing times.

Other Emergencies:

For emergencies other than weather or power outages, staff will maintain operations if the safety of the staff and public are not endangered.

Extended Closure:

In the event where the library is closed for an extended period of time, patron services will be modified or temporarily suspended:

- The library's Facebook and Instagram pages will have the latest information regarding closures and library services.
- All programs will be cancelled or postponed.
- All meeting room reservations will be cancelled or postponed.
- Patrons will still be able to request holds or reserves but will not be able to pick them up.
- Checking out of physical materials will be halted.
- Unless the emergency affects e-resources, they should still be available for patron use outside of the library.
- Materials should be returned through the book drop located outside of the library building.
- Late fees will not be assessed if patrons are not allowed to return materials during the closure.
- When the library re-opens, it may do so with limited hours and/or services, temporarily.

FOR STAFF:

When the library must close in accordance with policy due to a power failure, staff will be paid for their normal working hours for that current day only. Weather related closings such as area flooding or heavy snowfall is at the discretion of the Library Director. Staff will be paid for the normal working hours for that current day only. Extended power outages or weather conditions causing closures would follow the extended closure policy.

If closing the building:

- Contact Library Director and Board President
- Place appropriate signage on the front door.
- Send closing messages on social media.
- Change phone greeting to reflect emergency closing.
- Follow normal end of day procedures.

For Extended Closures:

- Inform the public of all measures the library is taking via social media.
- Place informational signage on doors and main sign board.
- Replace all in-person meetings with teleconferencing.
- Allow staff to work from home if possible.
- Cancel all programs and meeting room reservations.
- Suspend the charging of fines for late materials
- Modify work schedules and duties as needed
- Regularly check staff emails for updates
- Assign care of 'library pets' to staff or board members willing to care for them.

Social Media Policy

The Belmont Literary and Historical Society Free Library social media sites are intended to inform community members about programs, services, events and educational opportunities taking place at the Library within the Library's community, or Southern Tier Library System (STLS) member libraries. Our sites also encourage dialogue, the exchange of information and ideas between the Library, STLS member libraries and community members.

Social media is defined as any web application, site or account registered to the Library that facilitates the sharing of information and ideas about library – related subjects, community events or library system services. Social media formats include blogs, listservs, websites, social networks, and any other digital platforms that facilitate information exchange.

The Belmont Literary and Historical Society Free Library reserves the right to create, edit, and remove any content on its social media sites created by library staff, member libraries, or community members. Content is considered posts, comments, messages, and all other types of written, visual or audio content.

When posting to the library's social media sites, users allow library employees to reuse (share) that content without the user being compensated for them and without the library being liable for them.

The Library strives to foster a positive, creative and healthy social media experience. Anyone who interacts with social media formats in contrast to this belief can be blocked from use. Content containing the following are against Library policy and will be removed:

- Slanderous, libelous, threatening or defamatory statements.
- Copyrighted or trademarked material.
- Spam.
- Content not related to STLS' mission, programs, events, resources, or materials.
- Advertising or sale of merchandise or services; or
- Charitable solicitations or political campaigning.
- Duplicated posts from the same individual.
- Inappropriate/obscene/off-topic posts, images, or comments.
- Specific and imminent threats.

If said content is removed, a message will be sent privately (if possible) to the person(s) responsible. A second offense will result in a ban from posting to the Library's social media accounts. A third offense results in a permanent block. In the case of spam or commercial advertisements, the library will permanently block the user without warning.

The Library encourages community members and other STLS member libraries to comment on or share library posts. The sharing of ideas about related subjects, resources, and programs is also permitted. Comments or postings by community members and other libraries does not indicate Library endorsement. The library will not answer questions pertaining to Library Board matters through social

media. These questions should be directed to the Library Board during Public Comment at a regular meeting.

Community members and other STLS member libraries are responsible for their own content and should be aware that they may be held liable for commentary that is defamatory, obscene, proprietary, or libelous by any offended party, not just the Library. By choosing to comment on Library social media sites, individuals agree to these terms. The Library does not collect, maintain, or otherwise use personal information stored on any third party social media sites, other than to communicate with users.

Library Staff Responsibilities

Employees who contribute to Library social media accounts shall present content in a professional manner, check facts, cite sources, avoid copyright infringement, present balanced views, acknowledge and correct errors, and check grammar and spelling before posting. Employees shall not discuss confidential, work-related matters through social media.

Content that is posted on Library-sponsored social media sites is subject to the Freedom of Information Act and records retention requirements.

Library staff are public employees and cautioned that content shared pursuant to official duties is not protected speech under the First Amendment and may form the basis for discipline if deemed a violation of Library policy or procedure. Employees shall keep in mind the following best practices.

When representing Library via social media, staff shall:

- Conduct themselves at all times as representatives of Library.
- Identify themselves by name as Library personnel, when appropriate.
- Not make statements about patrons, or post, transmit, or otherwise disseminate confidential information in violation of Library Confidentiality Policy.
- Not represent postings as official Library opinion or policy, unless this has been clearly approved by the Library Director.
- Not conduct political activities or personal business.
- Observe and abide by all copyright, trademark, and service mark restrictions in posting materials to social media.

Public Communication Policy

The Belmont Literary and Historical Society Free Library Board of Trustees is responsible for promoting public awareness of library services and fostering community support. The Board recognizes that effective public relations involve all individuals connected to the library, including staff, volunteers, and trustees. Professionalism and quality service in all public interactions contribute to the library's positive image and strong community relationships.

Official statements to the public and media will be made by the Library Director or the Board President in consultation with the Library Director. If anyone other than these individuals need to release information on behalf of the library, the content must be reviewed and approved by both the Library Director and Board President before distribution.

Each year, at its annual Organizational Meeting, the Board of Trustees will designate the official newspaper for library announcements.

Social media and email communications are essential tools for library outreach. Designated staff are responsible for maintaining and updating all library-affiliated social media platforms. All postings must adhere to the Board-approved Social Media Policy and reflect the library's mission and values. Library-related questions submitted through social media will be addressed appropriately; however, questions related to Library Board matters must be directed to the Board during the public comment portion of a regular meeting.

Library staff and trustees are entitled to a safe and respectful work environment, both within the library and online. Any online communication directed at library staff or trustees that is harassing, threatening, or otherwise inappropriate will be addressed by the Library Director in consultation with the Board President. Any incidents posing a risk to personal safety will be documented and reported to the appropriate authorities.

Personnel Policy

Equal Opportunity Employment:

The Belmont Literary and Historical Society Free Library (hereafter referred to as “Library”) maintains a strong policy of equal employment opportunity. We take affirmative action to ensure equal employment opportunity for all employees and applicants. We hire, train, promote, and compensate employees on the basis of personal competence and potential for advancement without regard for race, color, religion, sex, sexual orientation, national origin, age, or physical impairments.

At-Will Employment

The Library is an “at will” employer. It is the Library’s policy not to specify any length of employment and hire all employees “at will.” At will means the employee may terminate their employment at any time for any reason without cause or advance notice and the Library may terminate an employee at any time, with or without cause or advance notice provided the Library does not violate federal or state laws.

Job Title and Descriptions

Library employees (both full-time and part-time) are assigned a job title when hired. Library job titles have a job description that details the type of work required and expected by Library. A job description will be presented to all Library employees as part of the hiring process including their professional or non-professional status and hourly rate of pay. Library employees are expected to know and perform the duties assigned to them as outlined in their job description.

Job descriptions are listed at the end of this document.

Paid Time Off and Leave

Paid Time Off (PTO)

After one (1) year of service, the library director shall be entitled to one times (1x) the average hours worked during the previous year. After five (5) years of service, the library director shall be entitled to two times (2x) the average hours worked during the previous year. An absent duty form must be filled out at least two (2) weeks prior to vacation and must be pre-approved by the Board of Trustees President. Vacation time is received at the first of each calendar year regardless of the director’s start date. Vacation hours may not accumulate year to year. Upon termination or retirement, the library director is not entitled to be paid for any unused portion of vacation time.

Bereavement Leave

Paid funeral leave for immediate family is 3-paid days per occurrence on scheduled workdays. This leave is for immediate family and includes grandparent(s), parent(s), partner(s), child(ren), sibling(s) and in-law(s).

Jury Duty

In the event a library employee is called for jury duty, the library will release him or her and assure no loss of wages. Employees will be paid the difference between the jury pay and wages for the hours they were scheduled.

Military Leave

The Library will abide by the Uniform Services Employment and Reemployment Rights Act (USERRA) by granting a military leave of absence to employees who are absent from work because of service in the U.S. uniformed services. Advance notice of military service is required, unless military necessity prevents such notice, or it is otherwise impracticable. Military leaves of absence are unpaid; however, employees may use any earned but unused PTO for military leave.

Family and Medical Leave

Employees may take up to 12 weeks of unpaid, job-protected leave during the calendar year for specific family and medical reasons. To be eligible, an employee must have worked at the library at least 1,250 hours over 12 months.

Leave is granted for birth and care of a newborn, care of a newly adopted child, care for a seriously ill immediate family member (partner, child, and parent), and a personal serious health condition.

The employee is guaranteed the same or equivalent job if returning within the 12-week period. If receiving health benefits, the same benefits continue throughout the leave.

Employees must use all accumulated PTO as part of the leave. Visit New York State – Paid Family Leave website for more details. <https://paidfamilyleave.ny.gov/>

New York Sick Leave Law

The Library will maintain and provide time off to employees based on the New York Sick Leave Law, currently up to 40 hours of unpaid time. On top of the unpaid leave mandated by the state, the Library also allows employees to take three (3) paid sick days per calendar year. Sick leave days (hours) may not accumulate from year to year. Frequent or extended illness will require a doctor's certification to be submitted to the Board of Trustees. Upon termination or retirement, library staff are not entitled to be paid for any unused portion of the sick leave.

Visit New York State – Sick Leave Law website for more details. <https://www.ny.gov/new-york-paid-sick-leave/new-york-paid-sick-leave>

Holidays

The Belmont Literary and Historical Society Free Library is closed on the following days each year:

New Years Eve

New Year's Day

Saturday Before Memorial Day

Memorial Day
Juneteenth
Independence Day
Saturday before Labor Day
Labor Day
Veteran's Day
Thanksgiving Day
Day After Thanksgiving
Christmas Eve
Christmas Day
Day after Christmas

The library director will receive holiday pay for the above holidays if said holiday falls on a normally scheduled working day. No more than four (4) holidays will be paid each year.

Work Practices

Performance Evaluations

Every employee should have a written evaluation. For a new employee, these written evaluations should be completed at the end of the probationary period and then on an annual basis before the first board meeting in January.

The library director will be evaluated at the end of a six (6) month probationary period, then have their performance and salary evaluated on an annual basis before the first board meeting in January. This evaluation will be performed by the Board of Trustees consisting of at least 4 present members.

Library staff will be evaluated at the end of a six (6) month probationary period, then have their performance and salary evaluated on an annual basis before the first board meeting in January. This evaluation will be performed by the Library Director and then submitted to the Board of Trustees.

All evaluations should be based on the employee's job description, personal goals, library goals, and mission for the upcoming year.

Evaluations, as well as any written comments, should be kept in the employee's personnel file. All employees have access to their evaluations and may examine them upon request.

Library Director Evaluation

An important way to ensure and support a highly effective library director is for the board to commit to meaningful performance evaluations annually. The library board and director should have a discussion at the beginning of each year to set goals for achievement and professional growth that are aligned with the library's mission. By linking the evaluation to goal achievement, the board and director are assured that they are heading in the same direction and have the same priorities. When determining what goals to focus on in the coming year, a good place to start is with the director's job description and the most recent strategic plan.

Though not a comprehensive list of focus areas, generally the library director would be evaluated on the following:

1. Staff relationships and management

- a. Are there signs of low morale among staff?
 - b. Are there high overall accomplishments?
2. Library goals in the strategic plan
 - a. Are planning efforts ongoing?
 - b. Is the staff engaged?
 - c. What goals have been accomplished and what will need further focus in the coming year?
3. Financial responsibility and oversight
 - a. Is the budget on target?
 - b. Is the money well spent during the course of the year?
 - c. Have grants been written?
 - d. Have partnerships been created to help fund special projects?
4. Overall quality of library services
 - a. Is public feedback sought about the quality and scope of the collection?
 - b. Are services highly used?
 - c. What kind of media attention do library services get?
 - d. How does the director evaluate service effectiveness?
5. Community relations
 - a. Is the director identifiable as a community leader?
 - b. Does the director participate in task forces and committees within the community?
 - c. Does the director foster a library volunteer program?
6. Facilities management
 - a. Does the director ensure the library is neat, clean, and well maintained?
 - b. Are marketing and merchandising techniques used to highlight the library's collections and services?
7. Board relationships
 - a. How well is the director communicating with the board?
 - b. Is the board kept up to date on pertinent issues?
 - c. Does the director take time to discuss national and statewide trends that may have an impact on local services?

These are some broad areas of discussion both in setting goals and assessing their accomplishment. The process may look different for every board. Some boards will appoint a committee to do the evaluation while others may involve the whole board. All board members should have the opportunity to give input even if they are not directly involved in the evaluation itself.

Personnel Records

Important events in each employee's history should be recorded and kept in the employee's personnel file. Application forms, resumes, performance evaluations, payroll information, attendance records, commendations, corrective action warnings, educational attainment records, and emergency contacts are examples of records that should be maintained.

The Board Treasurer is responsible for notifying the payroll office of changes in address, telephone number, marital status, and change of status of dependents as income tax status and group insurance may be affected by these changes. This up-to-date information enables the payroll office to keep accurate records. This responsibility includes employees on leaves of absence.

Training

The library director will receive compensation for travel and other expenses incurred while attending library-related meetings, workshops, classes, etc. The time spent at such meetings, as well as travel to and from such meetings will be considered work time.

Approval for educational leave and/or tuition reimbursement shall be at the discretion of the Board of Trustees and requires prior approval.

Dress Code

Library staff should dress appropriately and present a neat, clean, and professional appearance during business hours or when representing the Library. We will try to reasonably accommodate library staff who have special dress or grooming needs that are the result of religion, ethnicity, race, or disability.

Attendance and Punctuality

The Belmont Literary and Historical Society Free Library expects employees to be reliable and punctual in reporting for their scheduled work. Library staff will not be penalized for occasional lateness due to a genuine emergency or factors beyond one's control. Habitual lateness fifteen (15) or more times per calendar year is cause for dismissal. Personal business should not be done during library time.

Documentation of Poor Performance (disciplinary actions)

Library staff will be evaluated on their job performance regularly, with a focus on customer service, collection maintenance, program support, and adherence to library policies. If poor performance or misconduct is identified, the following steps will be taken:

- Verbal warning: An initial discussion about the issue, such as failure to follow library procedures, mishandling materials, or poor patron interactions, offering an opportunity for improvement.
- Written warning: Documentation of ongoing issues, including specific examples like neglecting circulation duties, failing to maintain organized collections, or repeated tardiness.
- Final warning or termination: If improvements are not made, further action may result in termination of employment.

Grievance Procedure

Library employees who wish to raise a workplace concern or dispute may follow this process:

- Step 1: Discuss the issue with the Library Director or immediate supervisor, whether it concerns scheduling conflicts, workload concerns, or policy disagreements.

- Step 2: If unresolved, submit a written grievance outlining the concern, how it affects library operations or staff morale, and the desired resolution.
- Step 3: A formal meeting will be arranged to address the matter, and a written decision will be provided.

The library is committed to fostering a positive work environment and ensuring fair treatment for all staff members.

Workplace Safety

Federal and state laws require that most employers furnish a place of employment that is free from recognized hazards that cause or are likely to cause death or serious physical harm to employees. In most instances, an employee may anonymously complain to a state or federal agency about an unsafe work environment and be protected against employer reprisals.

Each employee is expected to obey safety rules and to exercise caution in all work activities. Employees must immediately report any unsafe work conditions to the Board of Trustees. Employees who violate safety standards, cause hazardous or dangerous situations, fail to report where appropriate, and/or remedy a situation, when possible, may be subject to disciplinary action, up to and including termination of employment. Employees are expected to follow all library safety rules.

In the case of accidents that result in injury, regardless of how insignificant the injury may appear, employees should immediately notify the Library Director or a board member. Such reports are necessary to comply with laws and initiate insurance and workers' compensation benefits procedures.

Workplace Harassment

Harassment is a form of employment discrimination that violates Title VII of the Civil Rights Act of 1964, the Age Discrimination in Employment Act of 1967, and the Americans with Disabilities Act. Harassment is unwelcome conduct that is based on race, color, religion, sex (including pregnancy), national origin, age (40 or older) disability, or genetic information. Harassment becomes unlawful when a) enduring the offensive conduct becomes a condition of employment or b) the conduct is severe or pervasive enough to create a work environment that a reasonable person would consider hostile, intimidating, or abusive.

The Belmont Literary and Historical Society Free Library has a zero-tolerance policy against harassment. The Library will not tolerate, condone, nor allow harassment. Individuals covered under this policy include employees and applicants for employment; volunteers and members of the public; vendors, trades people, and others conducting business with the Belmont Literary and Historical Society Free Library; and elected and appointed officials.

The Library is committed to providing a work environment that is free of discrimination and unlawful harassment. Actions, words, jokes, or comments based on an individual's race, color, religious creed, ancestry, national origin, age, sex, sexual preference, disability, or any other legally protected characteristic will not be tolerated. As an example, harassment (both overtly and subtle) is a form of employee misconduct that is demeaning to another person, undermines the integrity of the employment relationship, is strictly prohibited, and is illegal.

Third-Party harassment is prohibited. Third-party harassment includes harassment of the employees by the general public and vendors. Any employee who experiences it should submit harassment complaints to their supervisor. Corrective action appropriate for the offense and sufficient to stop the harassment will be taken. It can range from a verbal or written warning to legal action. Any employee encountering harassment is encouraged but not required to inform the person that their actions are unwelcome and offensive. This initial contact can be either verbal or in writing. The employee should document all incidents of harassment in order to provide the fullest basis for investigation should it subsequently become necessary.

Job Descriptions

Library Director

Position Title: Library Director

Classification: Part Time, 20 hours per week minimum

Overview: Under the direction of the Board of Trustees, the Library Director develops, administers, and coordinates the work of the library and its staff in providing services to the community. The Library Director is expected to develop programs, develop collections, manage social media accounts, manage staff/volunteers, assist in budget creation, and manage the library facilities.

Responsibilities:

1. Library Services:

- a. Check-in, check-out, and shelve books
- b. Assist patrons with reference questions and computer issues
- c. Organize Summer Reading Program and other programs
- d. Maintain library website and social media accounts
- e. Take material requests, process inter-library loans

2. Collection Development:

- a. Select library materials following the Collection Development Policy
- b. Catalog library materials
- c. Purge/Weed collection of outdated and unused materials
- d. Be knowledgeable of current titles and trends
- e. Prepare overdue notices

3. Administration:

- a. Prepare reports and attend all monthly board meetings
- b. Attend required system director's meetings
- c. Keep records of monthly/yearly circulation statistics
- d. Accurately account for monies exchanged during daily operations
- e. Perform basic technology troubleshooting
- f. Keep informed of possible grant opportunities
- g. Keep abreast of technology trends
- h. Carry out policies as adopted by the Board of Trustee
- i. Suggest amendments/additions to policies as necessary

4. *Personnel:*

- a. Train, supervise, and evaluate staff and volunteers
- b. Create work schedules when needed and notify the board president of changes

5. *Financial:*

- a. Prepare annual report for the state
- b. Prepare invoices and donations for the treasurer
- c. Assist with preparation of annual budget
- d. Review monthly income/expenditure reports
- e. Count down petty cash and prepare a log each month for the treasurer
- f. Stay within agreed upon budgeting

6. *Facility Maintenance:*

- Monitor building and grounds
- Contact appropriate services when needed
- Keep interior clean and safe
- Keep exterior public ways that the library is responsible for, clean and safe

Library Assistant

Position Title: Assistant to the Director

Classification: Part Time, 10 hours per week

Overview: Under the direction of the library director, the assistant to the director supports the daily operations of the library and ensures it remains a welcoming and resourceful space for our community. The ideal candidate will be friendly, organized, and passionate about promoting literacy and learning

Responsibilities:

- Assist patrons with locating materials, using library resources, and answering basic inquiries
- Check in and check out books and other library materials
- Take material requests and process system loans/inter-library loans.
- Register new patrons and maintain/update patron files as necessary.
- Shelf books and maintain orderly collections, ensuring materials are correctly cataloged and easily accessible
- Help with library programs, events, and community outreach initiatives, including preparing materials and setting up event spaces
- Provide basic technology assistance (e.g., computer use, printing, internet access) and troubleshoot minor technical issues
- Create simple displays to highlight library collections, programs, and seasonal themes
- Assist with processing new materials, including labeling and cataloging books
- Ensure the library space remains clean, organized, and inviting for visitors of all ages
- Track usage statistics and gather feedback from patrons to help improve library services
- Perform other tasks as needed to support the library's operations and staff

Circulation Clerk

Position Title: Circ Clerk

Classification: Part Time, 4 hours per week

Overview: Under the supervision of the Library Director, the Circulation Clerk supports day-to-day library functions with a focus on patron service and material circulation. This role is essential in ensuring a welcoming and organized environment, assisting community members with checkouts, returns, and general library use. The ideal candidate is reliable, approachable, and comfortable working independently during designated hours.

Responsibilities:

- Assist patrons with locating materials, using library resources, and answering basic inquiries
- Check in and check out books and other library materials
- Take material requests and process system loans/inter-library loans.
- Register new patrons and maintain/update patron files as necessary.
- Shelf books and maintain orderly collections, ensuring materials are correctly cataloged and easily accessible
- Provide basic technology assistance (e.g., computer use, printing, internet access) and troubleshoot minor technical issues
- Ensure the library space remains clean, organized, and inviting for visitors of all ages
- Track usage statistics and gather feedback from patrons to help improve library services
- Perform other tasks as needed to support the library's operations and staff

Library Cleaner

Position Title: Cleaner

Classification: Flexible, Part Time, 3 hours per week

Overview: Under the direction of the library director, the cleaner helps to keep the inside of the building clean and maintained.

Responsibilities:

- Sweep, mop, and vacuum floors throughout the library
- Dust and clean shelves, tables, chairs, and other furniture
- Empty trash bins and ensure proper disposal of waste
- Clean and sanitize restrooms, including sinks, toilets, and mirrors
- Ensure windows and glass surfaces are smudge-free
- Restock restroom supplies (soap, paper towels, toilet paper)
- Report any maintenance issues or supply shortages to library director
- Maintain a clean and welcoming environment for patrons and staff

Telephone Policy:

Library staff will not will NOT give out telephone numbers that do not appear in the telephone directory or are easily found with the use of an internet search engine. Staff will refuse to give unlisted numbers or assist in crisscross searches. Library staff is only permitted to use the library telephone for library business. Patrons are not permitted to use the library phone for calls. Cell phones are permitted by staff should be on vibrate only and calls should be taken only when necessary and outside of the building while patrons are present.

Food Policy:

The Belmont Literary and Historical Society Free Library does not allow patrons to have food or drink around the computer station. Please keep all food and drink limited to the main area table or the seating in the large print section. Food and beverages are NOT permitted in the children's area. Any unattended or carried refreshments outside of these designated spaces may be disposed of.

Pet Policy:

No pets allowed in the library due to liability insurance with the exception of a service animal as defined by the Americans with Disabilities Act (ADA):

- The ADA defines a service animal as a DOG that has been individually trained to do work or perform tasks for an individual with a disability.
- The task(s) performed by the dog must be directly related to the person's disability.
- Emotional Support, therapy, comfort, or companion animals are NOT considered service animals under the ADA.

Staff may only ask two specific questions: (1) is the dog a service animal required because of a disability? And (2) what work, or task has the dog been trained to perform? Staff are not allowed to request documentation for the dog, require that the dog demonstrate its task, or inquire about the nature of the person's disability.

Sexual Harassment Prevention Policy and Complaint Form

Introduction:

The Belmont Literary and Historical Society Free Library is committed to maintaining a workplace free from sexual harassment. Sexual harassment is a form of workplace discrimination. The Library has a zero-tolerance policy for any form of sexual harassment, and all employees are required to work in a manner that prevents sexual harassment in the workplace. This Policy is one component of our library's commitment to a discrimination-free work environment. Sexual harassment is against the law. All employees have a legal right to a workplace free from sexual harassment, and employees can enforce this right by filing a complaint internally with the library or with a government agency or in court under federal, state or local anti-discrimination laws.

Policy:

1. This policy applies to all employees, volunteers, trustees, applicants for employment, interns, whether paid or unpaid, contractors and persons conducting business with the library.
2. Sexual harassment will not be tolerated. Any employee or individual covered by this policy who engages in sexual harassment or retaliation will be subject to remedial and/or disciplinary action, up to and including termination.
3. Retaliation Prohibition: No person covered by this Policy shall be subject to adverse employment action including being discharged, disciplined, discriminated against, or otherwise subject to adverse employment action because the employee reports an incident of sexual harassment, provides information, or otherwise assists in any investigation of a sexual harassment complaint. The library has a zero-tolerance policy for such retaliation against anyone who, in good faith complains or provides information about suspected sexual harassment. Any employee of the library who retaliates against anyone involved in a sexual harassment investigation will be subjected to disciplinary action, up to and including termination. Any employee, paid or unpaid intern, or non-employee working in the workplace who believes they have been subject to such retaliation should inform a supervisor, manager, or trustee. Any employee, paid or unpaid intern or non-employee who believes they have been a victim of such retaliation may also seek compensation in other available forums, as explained below in the section on Legal Protections.
4. Sexual harassment is offensive, is a violation of our policies, is unlawful, and subjects the library to liability for harm to victims of sexual harassment. Harassers may also be individually subject to liability. Employees of every level who engage in sexual harassment, including managers and supervisors, who engage in sexual harassment or who knowingly allow such behavior to continue, will be penalized for such misconduct.
5. The library will conduct a prompt, thorough and, where possible, confidential investigation that ensures due process for all parties, whenever management receives a complaint about sexual harassment, or otherwise knows of possible sexual harassment occurring. Effective corrective action will be taken whenever sexual harassment is found to have occurred. All employees, including

managers and supervisors, are required to cooperate with any internal investigation of sexual harassment.

6. All employees are encouraged to report any harassment or behaviors that violate this policy. The library will provide all employees a complaint form for employees to report harassment and file complaints.
7. Managers and supervisors are **required** to report any complaint that they receive, or any harassment that they observe to the director or a trustee.
8. This policy applies to all employees, paid or unpaid interns, and non-employees and all must follow and uphold this policy. This policy must be posted prominently in all work locations and be provided to employees upon hiring.

What Is “Sexual Harassment”?

Sexual harassment is a form of sex discrimination and is unlawful under federal, state, and (where applicable) local law. Sexual harassment includes harassment on the basis of sex, sexual orientation, gender identity and the status of being transgender.

Sexual harassment includes unwelcome conduct which is either of a sexual nature, or which is directed at an individual because of that individual’s sex when:

Such conduct has the purpose or effect of unreasonably interfering with an individual’s work performance or creating an intimidating, hostile or offensive work environment, even if the complaining individual is not the intended target of the sexual harassment;

Such conduct is made either explicitly or implicitly a term or condition of employment; or

Submission to or rejection of such conduct is used as the basis for employment decisions affecting an individual’s employment.

A sexually harassing hostile work environment consists of words, signs, jokes, pranks, intimidation or physical violence which are of a sexual nature, or which are directed at an individual because of that individual’s sex. Sexual harassment also consists of any unwanted verbal or physical advances, sexually explicit derogatory statements or sexually discriminatory remarks made by someone which are offensive or objectionable to the recipient, which cause the recipient discomfort or humiliation, which interfere with the recipient’s job performance.

Sexual harassment also occurs when a person in authority tries to trade job benefits for sexual favors. This can include hiring, promotion, continued employment or any other terms, conditions or privileges of employment. This is also called “quid pro quo” harassment.

Any employee who feels harassed should complain so that any violation of this policy can be corrected promptly. Any harassing conduct, even a single incident, can be addressed under this policy.

Examples of Sexual Harassment

The following describes some of the types of acts that may be unlawful sexual harassment and that are strictly prohibited:

Physical assaults of a sexual nature, such as:

- Touching, pinching, patting, grabbing, brushing against another employee's body or poking another employee's body;
- Rape, sexual battery, molestation or attempts to commit these assaults.
- Unwanted sexual advances or propositions, such as:
- Requests for sexual favors accompanied by implied or overt threats concerning the victim's job performance evaluation, a promotion or other job benefits or detriments;
- Subtle or obvious pressure for unwelcome sexual activities.

Sexually oriented gestures, noises, remarks, jokes or comments about a person's sexuality or sexual experience, which create a hostile work environment.

Sexual or discriminatory displays or publications anywhere in the workplace, such as:

- Displaying pictures, posters, calendars, graffiti, objects, promotional material, reading materials or other materials that are sexually demeaning or pornographic. This includes such sexual displays on workplace computers or cell phones and sharing such displays while in the workplace.

Hostile actions taken against an individual because of that individual's sex, sexual orientation, gender identity and the status of being transgender, such as:

- Interfering with, destroying or damaging a person's workstation, tools or equipment, or otherwise interfering with the individual's ability to perform the job;
- Sabotaging an individual's work;
- Bullying, yelling, name-calling.

Who Can Be a Target of Sexual Harassment?

Sexual harassment can occur between any individuals, regardless of their sex or gender. New York Law protects employees, paid or unpaid interns, and non-employees, including independent contractors, and those employed by companies contracting to provide services in the workplace. A perpetrator of sexual harassment can be a superior, a subordinate, a coworker or anyone in the workplace including an independent contractor, contract worker, vendor, client, patron or visitor.

Where Can Sexual Harassment Occur?

Unlawful sexual harassment is not limited to the physical workplace itself. It can occur while employees are traveling for business or at employer sponsored events or parties. Calls, texts, emails, and social media usage by employees can constitute unlawful workplace harassment, even if it occurs away from the workplace premises or not during work hours.

What is “Retaliation”?

Unlawful retaliation can be any action that would keep a worker from coming forward to make or support a sexual harassment claim. Adverse action need not be job-related or occur in the workplace to constitute unlawful retaliation.

Such retaliation is unlawful under federal, state, and (where applicable) local law. The New York State Human Rights Law protects any individual who has engaged in “protected activity.” Protected activity occurs when a person has:

- filed a complaint of sexual harassment, either internally or with any anti-discrimination agency;
- testified or assisted in a proceeding involving sexual harassment under the Human Rights Law or other anti-discrimination law;
- opposed sexual harassment by making a verbal or informal complaint to management, or by simply informing a supervisor or manager of harassment;
- complained that another employee has been sexually harassed; or
- encouraged a fellow employee to report harassment.

Reporting Sexual Harassment

Preventing sexual harassment is everyone’s responsibility. The library cannot prevent or remedy sexual harassment unless it knows about it. Any employee, paid or unpaid intern or non-employee who has been subjected to behavior that may constitute sexual harassment is encouraged to report such behavior to a supervisor, manager or Superintendent’s Designee. Anyone who witnesses or becomes aware of potential instances of sexual harassment should report such behavior to the director or trustee.

Reports of sexual harassment may be made verbally or in writing. A form for submission of a written complaint is attached to this Policy, and all employees are encouraged to use this complaint form. Employees who are reporting sexual harassment on behalf of other employees should use the complaint form and note that it is on another employee’s behalf.

Employees, paid or unpaid interns or non-employees who believe they have been a victim of sexual harassment may also seek assistance in other available forums, as explained below in the section on Legal Protections.

Supervisor Responsibilities

All supervisors and managers who receive a complaint or information about suspected sexual harassment, observe what may be sexually harassing behavior or for any reason suspect that sexual harassment is occurring, are required to report such suspected sexual harassment to the director or a trustee.

In addition to being subject to discipline if they engaged in sexually harassing conduct themselves, supervisors and managers will be subject to discipline for failing to report suspected sexual harassment

or otherwise knowingly allowing sexual harassment to continue. Supervisors and managers will also be subject to discipline for engaging in any retaliation.

Complaint and Investigation of Sexual Harassment

All complaints or information about suspected sexual harassment will be investigated, whether that information was reported in verbal or written form. Investigations will be conducted in a timely manner and will be confidential to the extent possible.

An investigation of any complaint, information or knowledge of suspected sexual harassment will be prompt and thorough and should be completed within 30 days. The investigation will be confidential to the extent possible. All persons involved, including complainants, witnesses and alleged perpetrators will be accorded due process to protect their rights to a fair and impartial investigation.

Any employee may be required to cooperate as needed in an investigation of suspected sexual harassment. Employees who participate in any investigation will not be retaliated against.

Investigations will be done in accordance with the following steps:

1. Upon receipt of complaint, the director will conduct an immediate review of the allegations, and take any interim actions, as appropriate. If complaint is oral, encourage the individual to complete the “Complaint Form” in writing. If he or she refuses, prepare a Complaint Form based on the oral reporting.
2. If documents, emails or phone records are relevant to the allegations, take steps to obtain and preserve them.
3. Request and review all relevant documents, including all electronic communications.
4. Interview all parties involved, including any relevant witnesses;
5. Create a written documentation of the investigation (such as a letter, memo or email), which contains the following:
 - a. A list of all documents reviewed, along with a detailed summary of relevant documents;
 - b. A list of names of those interviewed, along with a detailed summary of their statements;
 - c. A timeline of events;
 - d. A summary of prior relevant incidents, reported or unreported; and
 - e. The final resolution of the complaint, together with any corrective actions action(s).
6. Keep the written documentation and associated documents in the employer’s records.
7. Promptly notify the individual who complained and the individual(s) who responded of the final determination and implement any corrective actions identified in the written document.
8. Inform the individual who complained of their right to file a complaint or charge externally as outlined below.

Sexual Harassment Complaint Form:

Your complaint of Sexual Harassment is made against:

Name: _____ Title: _____

Work Address: _____

Work Phone: _____

Relationship to you: ☐ Supervisor ☐ Subordinate ☐ Co-Worker ☐ Other

Please describe the conduct or incident(s) that is the basis of this complaint and your reasons for concluding that the conduct is sexual harassment. Please use additional sheets of paper if necessary and attach any relevant documents or evidence.

Date(s) sexual harassment occurred: _____

Is the sexual harassment continuing? ☐ Yes ☐ No

Please list the name and contact information of any witnesses or individuals that may have information related to your complaint:

The last two questions are optional but may help facilitate the investigation.

Have you previously complained or provided information (verbal or written) about sexual harassment at the library? If yes, when and to whom did you complain or provide information?

Employees that file complaints with their employer might have the ability to get help or file claims with other entities including federal, state or local government agencies or in certain courts.

Have you filed a claim regarding this complaint with a federal, state or local government agency?

☐ Yes ☐ No

Have you instituted a legal suit or court action regarding this complaint? ☐ Yes ☐ No

Have you hired an attorney with respect to this complaint? ☐ Yes ☐ No

I request that the library investigate this complaint of sexual harassment in a timely and confidential manner as outlined below and advise me of the results of the investigation.

Signature: _____

Date: _____

Whistleblower and Ethical Behavior Policy

The Belmont Literary and Historical Society Free Library expects trustees, employees, and volunteers to uphold high ethical standards, including honesty, integrity, and compliance with all applicable laws and regulations. The Board of Trustees embraces the organization's values of integrity, respect, cooperation, and professionalism in all interactions. Harassment or discrimination based on legally protected characteristics is strictly prohibited.

This policy applies to all individuals associated with the library, including employees, trustees, officers, volunteers, and agents.

Purpose & Reporting Standards

- The library encourages the confidential reporting of concerns related to:
- Harassment or bullying that creates a hostile work environment.
- Questionable accounting, auditing, or financial practices.
- Violations of laws, regulations, or library policies.
- Misuse of library resources for personal gain.

The Board of Trustees ensures that complaints are received, reviewed, and appropriately addressed while protecting whistleblowers from retaliation.

Reporting Procedures

For Employees:

- Employees should report concerns confidentially to their immediate supervisor. If unresolved, a formal written complaint should be submitted to the Library Director.
- If the concern involves the supervisor, employees may report directly to the Library Director.
- If the concern involves the Library Director, employees may report directly to the President of the Board of Trustees.

For Trustees, Volunteers, & the Public:

- Written complaints should be submitted to the President of the Board of Trustees.
- If the President is unavailable or involved in the complaint, concerns should be directed to the Vice President.
- The Board may designate a committee to investigate complaints and consult legal or external experts as needed.

All complaints will be handled confidentially and resolved in a timely manner. If a complainant is unsatisfied with the resolution, they may seek review by the State Librarian.

Acting in Good Faith

Reports must be made in good faith, with reasonable grounds for concern. False or malicious reports may result in disciplinary action, including termination or removal from a position.

Confidentiality & No Retaliation

All reports will be treated with confidentiality to the extent possible for a thorough investigation. Retaliation against individuals who report concerns in good faith is strictly prohibited and may result in disciplinary action.

Director Spending Policy

Purpose

In order to operate the Belmont Literary and Historical Society Free Library in an efficient manner on a day-to-day basis, the Board of Trustees has established a purchasing policy to direct the Library Director in daily spending decisions. By establishing this policy, the Board of Trustees is entrusting the Library Director with the responsibility of knowing budget limits and when purchases must be approved by the Board of Trustees as defined by this policy.

Purchase Definitions

The term “purchase(s)” means the acquisition of goods and services for the Belmont Literary and Historical Society Free Library exclusive of (1) payroll, and (2) taxes.

Purchase Limits and Procedures

All purchases are to be made within the limits of the annual budget as established each year by the Board of Trustees. The responsibility for monitoring these expenses rests with the Library Director. The Library Director will work with the Board Treasurer to ensure accurate financial records. Monthly financial reports will be sent the Library Director and the Board of Trustees by the Board Treasurer.

Purchases at the Library Director’s discretion shall follow the following criteria:

1. Purchases shall not be in excess of \$300.00
2. Single item purchases shall not be in excess of \$300.00
3. Collection purchases are exempt from the limits set in items 1 and 2 and are solely at the discretion of the Library Director.
4. Purchases shall not create credit obligations which exceed normal trade payable terms, generally ≤ 30 days.
5. Purchases must remain within the limits of the annual budgets, and
6. Purchases must be necessary and in the ordinary course of business

In addition, emergency purchases are goods and services which must be purchased immediately if a delay threatens the life, health, safety, property, or welfare of the library, library staff, or patrons. If an emergency purchase needs to be made, the Library Director shall only need approval from the Board of Trustees President and the Library Director shall not need the approval from the entire Board of Trustees. Such emergency purchases will be presented to the Board of Trustees for ratification at the next regularly scheduled Board of Trustees meeting.

Invoice Authorization

All invoices in excess of \$300.00 need to be authorized by the Board of Trustees prior to payment. Invoices shall be initialed and dated by the responsible party and provided to the board treasurer for payment. If an invoice is not authorized as detailed above, the board treasurer will re-submit the invoice

for authorization. No payment will be made unless an invoice has been authorized and submitted to the board treasurer.

Credit/Debit Card Policy and Procedure

Purpose:

The purpose of this policy is to establish clear guidelines regarding the use of credit and debit cards issued to members of the Board of Trustees of the Belmont Literary and Historical Society Free Library in accordance with library business. This policy ensures transparency, accountability, and proper management of library funds while maintaining compliance with applicable laws and regulations.

Scope:

This policy applies to all members of the Board of Trustee who are issued a credit or debit card for the purpose of conducting library-related business. The policy is intended to govern the use, security, and accountability of such cards.

Eligibility for Card Issuance:

1. Eligible Board Members:

Only certain board members may be issued a credit or debit card based on their role or involvement in library-related financial activities. Specifically, cards may be issued to the **Board President, Vice President, Treasurer**, and other board members as approved by the Board for specific library business needs. All card issuances must be approved by a majority of the Board.

2. Library Director:

The **Library Director** may also be issued a credit or debit card, separate from the Board members. The Library Director uses this card to manage library operations, including staff expenses, library supplies, and other day-to-day library business needs. The Library Director must adhere to a separate set of policies specific to their role and spending responsibilities listed under the Director Spending Policy.

3. Approval:

A written request, detailing the reasons for card issuance and the expected use, must be submitted to the Board for review. The Board must approve any new issuances by a formal vote during a regular meeting.

Authorized Use

1. Business-Related Purchases Only:

- a. All purchases made using the library's credit or debit card must be directly related to the library's operations, programs, services, or business. This includes expenses for library materials, office supplies, software, travel for library business, and other approved purchases.

2. Examples of Authorized Purchases:

- a. Books, educational materials, and subscriptions for library use.
- b. Office supplies and equipment necessary for library operations.

- c. Conference and seminar registration fees for Board members to attend library-related events.
- d. Travel and accommodations for library-related business (with prior approval).
- e. Other expenses pre-approved by the Board of Trustees.

Unauthorized Use

1. **Prohibited Purchases:** The use of library credit or debit cards for any personal, non-library-related purchases is strictly prohibited. This includes, but is not limited to, the following:
 - a. Personal meals, entertainment, and travel.
 - b. Gifts, personal items, or any purchase unrelated to library operations.
 - c. Cash advances or withdrawals from the credit/debit card account.
2. **Consequences for Misuse:**
 - a. Any board member who uses their credit card for unauthorized personal purchases or cash advances will be required to reimburse the library for the amount spent. Further disciplinary action may be taken, including suspension or revocation of card privileges.

Procedures for Use:

1. **Pre-Approval:**

Any significant purchase above \$100 must be pre-approved by the Board of Trustees or a designated subcommittee before the transaction occurs. This ensures that all expenditures are aligned with the library's goals and budget.
2. **Documentation:**

Board members must retain and submit itemized receipts and documentation for all purchases made using the library credit or debit card. This includes the purpose of the expense, a detailed description of the item or service purchased, and the date and amount of the transaction.
3. **Reimbursement:**

If a Board member inadvertently uses their personal funds for an approved library-related purchase, they may submit a reimbursement request. However, personal funds should not be used as a substitute for using the credit/debit card for approved library business.
4. **Monthly Reporting:**

A monthly report of all transactions, including receipts and descriptions of purchases, will be reviewed by the Treasurer. The Treasurer will report on credit card usage at each regular Board meeting, ensuring transparency and accountability.

Security and Safeguards

1. **Card Security:**

The credit or debit card should be stored securely when not in use. Board members should take all reasonable precautions to ensure that the card is not lost, stolen, or used inappropriately.
2. **Reporting Lost or Stolen Cards:**

If a card is lost or stolen, the Board member must immediately report it to the library's Treasurer

and to the credit card company to ensure that the card is blocked and a replacement is issued. A report must also be made to the Board at the next meeting.

3. No Cash Advances:

Cash advances, whether at an ATM or over the counter, are strictly prohibited. Board members must not use the library's credit or debit card for any cash withdrawals.

Auditing and Compliance

1. Auditing:

The library's financial records, including the use of credit and debit cards by Board members, will be audited annually by an independent auditor. Any discrepancies or irregularities in card usage will be addressed promptly and may result in further actions by the Board.

2. Compliance with State Laws:

This policy is designed to comply with all relevant New York State laws and regulations governing public library operations, including those related to financial management, procurement, and public funds.

Board Member Acknowledgment

By accepting the library's credit or debit card, each Board member acknowledges and agrees to adhere to the guidelines outlined in this policy. A signed acknowledgment form will be required before any card is issued, confirming that the Board member has read, understood, and agreed to comply with the policy.

Credit/Debit Card Policy Acknowledgement Form:

I, _____, acknowledge that I have received, read, and understood the Belmont Literary and Historical Society Free Library Credit/Debit Card Policy and Procedures document. I agree to adhere to all guidelines and responsibilities outlined in the policy, including those related to authorized use, documentation, security, and accountability for purchases made with the library's credit or debit card.

I understand that:

- The credit/debit card issued to me is for library-related business only and may not be used for personal purchases.
- Any unauthorized use of the card may result in the requirement to reimburse the library for unauthorized charges and may lead to further disciplinary action.
- I am responsible for retaining itemized receipts and documentation for all purchases made using the card and submitting them as required by the policy.
- I will ensure that all purchases made are within the limits and guidelines set forth in the policy.
- I will promptly report any lost or stolen card to the Treasurer and the credit card company, and I will notify the Board at the next regular meeting.
- I must seek pre-approval for certain expenditures, as specified in the policy.

- I will comply with all reporting requirements and submit necessary documentation as part of the monthly reporting process.
- The Library Director has a separate policy governing their credit card use, and I understand the distinct roles and responsibilities related to the management of library finances.

By signing below, I confirm my understanding of these responsibilities and my commitment to comply with the policy.

- **Name:** _____
- **Title/Position:** _____
- **Date:** _____

Signature:

Please ensure that this acknowledgment form is signed and filed before any credit or debit card is issued to a Board member or the Library Director.

Purchasing Policy

Introduction:

The Belmont Literary and Historical Society Free Library is committed to conducting its purchasing activities in a fair, transparent, and competitive manner, ensuring value for money while adhering to all applicable laws and regulations. This policy outlines the principles and procedures governing the purchasing process, which involves the library director, trustees, and staff.

Objectives:

- To obtain quality goods and services at the best value for the needs of the library.
- To promote fair and open competition among businesses and suppliers.
- To ensure compliance with all legal and regulatory requirements.
- To foster environmentally sustainable and ethical purchasing practices.

Purchasing Thresholds:

The following thresholds determine the purchasing method to be used:

- *Up to \$3,000:* Purchases may be made without competitive bids, but with due regard for obtaining value for money and adherence to budgetary constraints. Purchases over \$3,000 require a formal resolution by the Board of Trustees at the request of the Library Director or appropriate Board Committee.
- *\$3,001 - \$20,000:* Requires obtaining at least three written quotations from qualified suppliers.
- *Above \$20,000:* Requires a formal competitive bidding process, which may include a request for proposal (RFP) or invitation to tender (ITT), depending on the nature of the procurement.

Purchasing Procedures:

- All purchasing activities shall be conducted in accordance with the library's purchasing policy and applicable laws and regulations.
- The purchasing process shall be transparent, ensuring equal opportunity for all qualified suppliers to participate.
- Requests for quotations or proposals shall clearly specify the goods or services required, evaluation criteria, and any other relevant information.
- Evaluation of bids shall be based on predetermined criteria, including price, quality, delivery time, and supplier qualifications.
- Contracts shall be awarded to the supplier offering the best value for money, considering both cost and non-cost factors.

Supplier Relationships:

- The library is committed to building and maintaining positive relationships with its suppliers, based on mutual respect, trust, and integrity.

- Suppliers shall be treated fairly and impartially throughout the purchasing process, with decisions based solely on merit and in the best interests of the library.

Compliance and Accountability

- Compliance with this purchasing policy is mandatory for all staff involved in the purchasing process.
- Any deviations from this policy must be justified and documented in writing, with appropriate approval obtained from designated authorities.
- The library's purchasing activities shall be subject to periodic review and audit to ensure compliance with this policy and applicable laws and regulations.
- The library will maintain internal controls to prevent fraud and misuse of funds. An annual independent audit or financial review shall be conducted to assess compliance and financial accountability.

Training and Capacity Building

- The library shall provide training and resources to staff involved in procurement activities to ensure understanding of this policy and relevant procedures.
- Continuous improvement initiatives shall be implemented to enhance procurement processes and promote best practices.

Financial Review and Audit Policy

Purpose

The Board of Trustees is committed to sound financial stewardship and transparency. To ensure the integrity of the library's financial practices and to maintain public trust, the library will conduct regular financial reviews and audits in accordance with best practices for New York State association libraries.

Audit and Review Schedule

- A **full independent audit** of the library's financial records shall be conducted **at least once every five years**.
- In the years between audits, the library shall conduct an **external financial review** or **agreed-upon procedures engagement** every **two years**.
- The schedule may be adjusted by majority vote of the Board of Trustees if circumstances warrant additional review.

Third-Party Independence

All audits and financial reviews shall be conducted by a **qualified independent accounting firm** or certified public accountant (CPA) that:

- Has **no affiliation** with the library, any current staff, trustees, or volunteers

- Is **not** the library's current bookkeeper, accountant, or financial advisor

The firm must be selected by the Board of Trustees through an open and documented selection process.

Board Oversight

The Board's Finance Committee (or a designated audit subcommittee) shall:

- Recommend firms for Board approval
- Provide the selected firm with all requested financial documentation
- Review audit/review findings and present them to the full Board
- Ensure any recommendations from the audit/review are addressed and documented in board minutes

Recordkeeping and Transparency

Final audit and review reports will be:

- Retained permanently in the library's financial records
- Available to funders and the public upon request

Policy Review

This policy shall be reviewed every three years or upon any material change in financial reporting standards or audit requirements for nonprofit libraries in New York State.

Endowment Fund Policy

Purpose

The Endowment Fund exists to enhance and support the mission of the Belmont Literary and Historical Society Free Library by strengthening long-term financial sustainability. Endowment earnings shall be used to improve library services, specifically in the areas of:

- Collection development
- Public programming
- Staff continuing education and training
- Technology Upgrades
- Facility improvements that enhance patron experience (non-routine upgrades)

Endowment funds are not intended to cover day-to-day operational expenses. However, the library board may use endowment funds to cover temporary budget shortfalls, handle unexpected emergency situations, or address short and long-term strategic priorities as long as there is a plan in place for restoring the endowment to current financial principle.

Oversight & Management

The Endowment is held in a separate investment account. Oversight is the responsibility of the Library Board of Trustees, with investment performance monitored annually. The Board may consult with a financial advisor or designated custodian as needed.

Spending Policy

Distributions from the Endowment shall:

- Be calculated annually in January, based on up to 4% of the average trailing 3-year balance
- Not exceed a maximum annual withdrawal of \$20,000, regardless of percentage-based calculation
- Be reviewed and approved by the Board before transfer

Distributions shall be transferred to the library's general account at the beginning of each calendar year for use in alignment with the fund's purpose.

Emergency Access to Principal

Use of endowment principal shall only be considered in the event of a financial emergency that threatens the library's ability to operate or exist.

Any such use must:

- Be approved by a **two-thirds majority vote** of the full Board of Trustees
- Include a **written rationale** and, if possible, a plan for restoration

Gifts and Restrictions

The Library welcomes both restricted and unrestricted endowment gifts. Donors may designate funds for specific purposes that align with the mission and values of the library. All restricted gifts must be approved by the Board of Trustees and documented in writing.

The Library does not impose a minimum donation threshold for endowment contributions.

Review and Adjustment

This policy shall be reviewed at least once every three years by the Board of Trustees, or more frequently if circumstances require. Adjustments to the spending rate or policy may be made by majority board vote in consultation with the library's financial advisor.