

# **Policy Manual**

**Iosco-Arenac District Library**

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## **Introduction**

This manual was created for all staff members, library trustees, governing units operating library branches, and interested citizens as a reference tool for library policies. It is designed to function as an instrument of uniformity for eight library branches and an administrative office; as a reference tool to answer questions of library policy; and as a remedy for potential problem situations.

## **Mission Statement**

Provide friendly, helpful and knowledgeable service to people of all ages by enriching their quality of life through traditional resources and technology, and promote the joy of life-long learning.

## **Vision**

- \*Support mutual cooperation between Iosco-Arenac District Library, government entities, branch library staff and our community.
- \*Maintain a comprehensive collection in a variety of formats based on patron and individual branch needs.
- \*Anticipate and respond to community needs for technology, programs and services.
- \*Pursue and provide current library technology and education that is responsive to community and staff needs.
- \*Capitalize on the advantages of small-community living.

## **Borrower Categories**

*Resident:* a resident or property owner of Iosco County or Arenac County who is at least 18 years of age. A resident is defined as a person who regularly resides in Iosco County or Arenac County whether on a permanent, temporary or seasonal basis.

*Non-resident:* a person who is not a resident or property owner of Iosco County or Arenac County or a person who does not present valid proof of such residence or property owned at the time of registration.

*Juvenile:* a person who is under the age of 18 with a registration form on file signed by a parent or legal guardian.

*Outreach:* a school, day care center, or other institution or agency that agrees to take financial responsibility for the loan of materials to its students, faculty, clientele and/or staff.

## **Eligibility to Borrow Materials**

A person is eligible to borrow materials if he or she is a registered borrower and has no outstanding overdue materials or unpaid fines or fees. A fine is defined as a monetary assessment to a borrower for overdue, lost, or damaged materials. An institution is eligible to borrow materials through an authorized person who registers and obtains a District Library card and signs a statement taking financial responsibility for borrowed materials.

A person must show valid identification when applying for a library card. Valid identification is defined as a form of identification showing a person's name connected with a current address. Valid identification may include an unexpired driver's license or state I.D., a voter registration card, a recent utility or telephone bill with the name associated with the address, a current property tax statement, and/or a piece of mail that is recently postmarked. Branch library staff may identify other forms of identification.

Borrowers are not allowed to use their library cards from any library outside of the Iosco-Arenac District.

Iosco-Arenac District Library does not participate in the MelCat Visiting Patron program.

*Renewing a Library Card:* The card will have an expiration date. When the card is expired, the person renews it by providing valid identification and the library card. If the card is lost, the person must reapply for a new card and pay a replacement fee of \$3.00. The \$3.00 fee will only be waived if the library card does not scan.

*Responsibilities of a Library Cardholder:* A cardholder must:

- Present the card and use the card identification number when borrowing materials from the library
- Report any changes in name or address
- Report the loss of the card as soon as possible
- Return the card to the library when the holder is no longer planning to use the card
- Agree not to loan the card to anyone

*Obtaining a Juvenile Card:* A juvenile under the age of 18 and able to sign/print his or her name, may obtain a card by providing information in person to complete a

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registration form which is then signed by his or her parent or legal guardian. The parent or legal guardian, if a borrower, must be in good standing without fines or fees and must provide valid identification. The parent or legal guardian must abide by the policies, procedures and restrictions imposed including being responsible for the return of materials borrowed and the payment of any outstanding fines and/or fees. The parent or legal guardian must sign the completed form in person.

## **Responsibilities of the Borrower**

A person or institution borrowing materials is responsible for the care and proper use of the materials including their return in the same condition that they were loaned (except for normal wear) on or before the due date.

A borrower is expected to use materials in compliance with all laws and regulations, including copyright.

The borrower card may only be used by the borrower it is issued to, or by a previously designated representative/surrogate.

A borrower may check out one time without their library card if they present written proof of identification and a prior waiver has not been issued and noted on the borrower record.

A library card is identified as the library-issued wallet card, key chain card or a copy of the card on a mobile device that scans correctly using the library's barcode reader.

A borrower may return materials to any branch library in the District during business hours with the exception of some CD/DVD materials and Fast Add materials (Fast Add materials are defined as any item that must have a short-term record created locally at an individual branch). Branch staff will inform the borrower that an item is a Fast Add and must be returned to the library where it was checked out. Branch staff will inform the borrower if a CD/DVD must be returned to the library where it was checked out. Branch book drop returns may be used before or after business hours for the return of books and magazines but are not to be used for the return of CD/DVD materials. Damage to CD/DVD materials returned in the branch drop boxes is the responsibility of the borrower.

The borrower should maintain any personal equipment used to listen or view District Library materials. The District Library is not liable for any damage to a borrower's personal equipment.

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## **Loans and Renewals**

All District owned material, if available for loan, is loaned free of charge.

Some material may be designated by the library as non-circulating and restricted to use in the library.

A borrower may request that specific material available for loan be sent to his or her local branch library.

A borrower may reserve, on a first-come first-served basis, books, CD and/or digital materials either on order or already owned by the District Library.

District staff has the discretion to extend or shorten loan periods for District owned material under appropriate circumstances including, but not limited to, long request/reserve lists, and institutional need for low-demand items.

Regular loan periods and renewal allowances are as follows:

- Books, CDs*: Three weeks with a single one-week renewal allowed (if there are no requests/reserves).
- Magazines*: Same as books except for the most current issue, which does not circulate in some branch libraries.
- Newspapers*: Do not circulate in some branch libraries. A one-year archive collection of Iosco County and Arenac County newspapers is maintained at District Headquarters. Archived newspapers do not circulate.
- Reserves/Requests*: Materials may not be renewed if there are other reserves and/or requests.
- Interloans*: Materials interloaned from libraries outside of the District are due back to the lending library on the dates designated on the interloan record. Interloan materials may be renewed if the lending library allows it.
- MelCat non-book AV materials*: Ten days with no renewals allowed.
- OverDrive/Libby Downloadable Audio and E-books*: Dependent upon OverDrive/Libby Consortia rules.
- Hoopla Downloads/Streaming*: Dependent upon vendor rules.

## **Reference Service**

A trained ALA/MLS degreed Librarian is available on a limited basis to assist with in-depth reference by telephone, fax, e-mail and in-person. Referral to other resources may be necessary and delays in receiving reference assistance may occur.

Wherever possible, and based on training and familiarity with the collection, library staff, present at the time of the request, will assist patrons in conducting reference searches. Referral to other resources may be necessary and delays in receiving reference assistance may occur.

## **Genealogy Research**

Requests for genealogy research--whether received by mail, fax, e-mail, telephone or in person--may be referred to a local genealogist specializing in this service. Genealogy services may require a fee to be determined and charged by the specialist and not by the District Library.

A genealogy collection is maintained at the Robert J. Parks Library in Oscoda, which is the primary library resource center for both Iosco County and Arenac County. Other libraries, due to space limitations, have limited but unique materials on local history and genealogy.

Referrals may be made to local Historical Societies and Genealogical Societies.

Access to databases of information through [www.mel.org](http://www.mel.org) and other Genealogy databases (includes Ancestry Library Edition) are available although some may be limited to in-library use only.

## **Interlibrary Loan**

The District Library participates in MelCat, White Pine Library Cooperative, ALA and Valley Library Consortium interloan activities and agrees to abide by established procedures and policies.

Many items are available for loan from other libraries when sufficient verification of the bibliographic data (author, title, year of publication, etc.) is available and if the library is

willing to loan the material. Due dates, fees, restrictions on use, and charges for loss or damage are determined by the library loaning the material. Items belonging to other libraries or items not catalogued by the District may have different overdue procedures and costs.

The borrower is responsible for providing as much information as possible about materials requested through interlibrary loan. Branch library staff will work to verify information or supply critical information that the patron cannot provide.

The District Library may refuse to request an item through interlibrary loan if any of the following is determined:

- If sufficient information is not available.
- If the item does not fit into interlibrary loan regulations.
- If the District owns the item (unless District staff believes it is lost, in high demand, or long overdue).
- If the District determines to purchase the item instead.
- If the borrower requesting the item has overdues, fines or fees owed.

The District Library limit on the number of interlibrary loan requests it handles at any one time for a person is ten requests with the exception of MelCat which has a limit of 50 items in process per State policy.

Branch library staff will work to notify a borrower within three branch library business days when an interlibrary loan item is received. An interlibrary loan item will be held for a borrower for seven calendar days only. If not picked up after seven calendar days the interloan will be returned to the lending library.

All fees charged to the District Library for an interlibrary loan transaction will be passed on to the borrower. The borrower must pay these fees before the borrowed material is checked out. The borrower must pay fines for overdue, lost, or damaged interloans to the District.

The District will pay any necessary shipping costs to send items to a borrowing or lending library. The borrowing library must pay any return postage or shipping.

Wherever possible, the District will use Michigan's statewide delivery service (RIDES) to send items to borrowing or lending libraries outside of the District.

All interlibrary loan requests and the use of materials obtained through interlibrary loan are subject to established interlibrary loan guidelines, policies and agreements. The



District adheres to the MelCat Resource Sharing Policies which are available for review by contacting the District Director.

### **Damaged and Lost Materials**

Damage due to negligence, improper use, rough handling, and other causes not attributed to normal wear is the responsibility of the borrower, who will be charged for the damage.

If the library must send material in for repair, the borrower will be charged the cost of the repair and any costs for shipping and handling. If library staff performed the repair, the cost for staff time and the supplies used for the repair will be charged to the borrower. Borrowers are not permitted to perform repairs on library materials, attempt repairs, or formally or informally contract with others to perform the repairs.

If material cannot be repaired, or if the cost of the repair is greater than the replacement cost, the charge to the borrower will be the same as if the material is lost. If the borrower pays the fee for damage that cannot be repaired, the borrower has the option of keeping the material. Final determination if the material should be repaired rests with the District Director.

If a borrower reports material as lost, the borrower will be charged a fee equal to the retail price of the material at the time it is reported as lost. If a current retail price cannot be determined, the borrower will be charged a fee based on the cost at the time the library acquired the material. In addition to the cost a processing and handling fee of \$5.00 will be charged to the borrower for each item lost.

Fines and fees for lost materials are not refundable.

The District is not obligated to replace material after it is lost and a fee is charged. The charges are considered compensation for the lost material. The library may determine that material is lost if the borrower has not returned it within 42 days of the due date.

A receipt for fees or fines paid will be issued to any borrower who requests it.

Money collected by branch libraries for lost or damaged material is sent to the District at least once per month with the amount indicated on a receipt form.

Borrowers may not replace lost or damaged materials by purchasing or otherwise obtaining new or used copies for the purpose of reducing or eliminating fines or fees.

## **Overdue Materials**

Borrowed material is considered overdue if it is not returned to the library on or before the due date. Overdue fines begin to accumulate the day after the due date, to a maximum fine per item. Material will have a due date receipt or other notification of the due date. Since a due date receipt is used for multiple transactions, it is likely to have more than one due date.

A set that circulates as one checkout is considered to be one item.

Overdue notification whether by telephone, mail, personal contact or other method (pre-overdue notices by e-mail are available) is a courtesy to the borrower and a reminder that material has not been returned to the library by the due date. The failure of a borrower to receive a reminder, or the failure of the library to give notice of overdues, does not remove the responsibility of the borrower to return material.

Library staff has the authority to refuse to loan materials if there is documentation that the borrower has outstanding overdues, owes fines or fees, or does not present a valid library card. Borrowing privileges are restored when a borrower returns any overdues and pays all outstanding fines or fees.

Materials returned to library book drops are considered returned the day the book drop was last emptied by branch library staff. Branch library staff should empty book drops at least one time each day the library is open to the public. Using library book drops does not cancel the responsibility of the borrower for overdue fines.

Borrower registration information and borrowing records are confidential and protected under Michigan and Federal Law. A parent or legal guardian may request the titles of overdue materials borrowed by his/her child if the parent or legal guardian was the signer of the registration form allowing the child to get a library card.

A receipt for return of library materials will be issued to any borrower who requests it.

Money collected for overdue materials is sent to the District at least once per month with the amount indicated on an income receipt form.

Items belonging to other libraries or items not catalogued by the District may have different overdue procedures and costs.

## **Selection and Withdrawal of Library Materials and Electronic Resources**

It is the responsibility of the Iosco-Arenac District Library to satisfy the diverse reading and listening needs and interests of the community through the selection, acquisition, and organization of library materials and electronic resources and to provide skilled guidance in their use.

Electronic resources consist of media delivered in a broadcast or interactive format other than the printed page including but not limited to databases, e-book delivery platforms and audio/video/data streaming or download services.

The District's major goals in selection are: the advancement of knowledge, the education and enlightenment of the people of the community, and the provision of recreation. Basic to these goals is the American Library Association's **Freedom to Read (EXHIBIT 1)** and **Library Bill of Rights (EXHIBIT 2)**.

The District Library does not attempt to promote any beliefs or points of view but recognizes its responsibility to strive to provide materials and electronic resources representing all points of view. The District Library serves many and varied groups of people. It cannot sacrifice the interests of others in order to satisfy any one group or person.

Responsibility for selection is vested in the District Director. However, the Director may delegate, to library staff or other individuals as are qualified by reason of training or education, the authority to interpret and guide the application of the policy in making day-to-day selections.

Overall selection and final determination of all library materials and electronic resources within the District Library rests within the framework of policies determined by the District Library Board of Trustees.

Based on the services it is expected to perform, the District Library provides circulating, reference and research materials and electronic resources for the general public. Special collections, in depth, are maintained when indicated by the community and where budget, storage and display space permits.

The following guidelines are used to determine selection:

Contemporary significance or permanent value

Accuracy

Authority, reputation and significance of author

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- Price, format, and ease of use
- Scarcity of information in the collection
- Availability of information elsewhere
- Demand
- Budget

Textbooks are not normally purchased except when information is not available via another resource.

DVDs are not purchased by the District. Some branch libraries maintain local collections of gift DVDs.

Guidelines for the de-selection (withdrawal from the collection) are the same as for selection and also include:

- Physical condition
- Duplication of title

Lost, discarded, misplaced and stolen library materials are accounted for financially in the annual reconciliation of the cost of fixed assets. A report is generated of all materials withdrawn through the automation system (currently Sirsi-Dynix Horizon 7.5.5). Material records are deleted after being listed as LOST, MISSING or TRACE for more than nine months after the due date and at least one shelf check is made. Periodically, materials are discarded [WEEDDED] due to condition, space limitations, validity of information and demand. These are also accounted for in the report generated by the automation system. Historical costs are associated with the withdrawals. A valuation report is provided to the auditors.

### **Objections to Library Materials**

People with objections or complaints may complete a **Request for Reconsideration of Library Material (EXHIBIT 3)**.

Library staff should not attempt to act “in loco parentis” (in the place of the parent). It is the parent’s or legal guardian’s right and responsibility to control or monitor the reading, viewing or listening of his/her child. Parents and legal guardians are encouraged to accompany their children when they use materials and computers in the library.

Filtering will be installed on all Internet workstations in a “good faith” effort to comply with the Children’s Internet Protection Act (CIPA) and Michigan’s Public Act 212 of 2000. If and when CIPA and Michigan PA 212 of 2000 permit, adults may request that

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filtering be temporarily disabled. Information on CIPA and Michigan PA 212 of 2000 may be requested by contacting the District Director.

## **Gifts and Donations**

The District Library accepts gifts of books and other library materials but reserves the right to evaluate and dispose of donations in accordance with the criteria applied to policies on selection and de-selection. Gifts and donations that do not meet with District policies and objectives may be refused, given to a branch library “Friends” organization for a book sale, or used for outreach collections. No conditions may be imposed by the giver/donor after acceptance of the gift or donation by the District Library.

District or branch library staff will not attempt to determine or appraise the value of donated materials but will issue, upon request, a receipt for the number and type of donated materials.

When the District Library receives a monetary gift for the purchase of materials for the Library, the District Director will determine selection after consultation with the giver. Upon request, the name of the giver or the person memorialized, or both, will be entered on a gift plate. A letter of receipt will be issued for all monetary gifts to the District Library.

Gifts of funds to purchase library materials to be added to the District collection may be subject to a processing fee determined periodically by the District Director.

Public Act 370 of 1998, signed into law on October 20, 1998, with immediate effect, amends Section 1 of the Act, MCL 397.381, to give libraries the option of transferring gifts of intangible property to a component fund within a community foundation under certain conditions. The provisions of Public Act 20 of 1943 govern the investment of a public library’s surplus funds. In the event that this option is chosen, the District will follow all necessary laws, regulations and rules.

## **Use of Library Equipment by the Public**

*Telefacsimile (Fax) Machines*-The District Library purchases and maintains fax machines at some Library Branches primarily for Library use. Public use of the fax machines is permitted if the local financial authority permits it. Only library staff is authorized to operate District-owned fax machines.

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If the local financial authority or an outside vendor owns the fax machine, the owner determines fees, provides maintenance and supplies, and controls operation.

#### Sending a Fax

If permitted, the local financial authority that pays the telephone bill determines the fee charged. Money collected by the Branch Library for sending a fax is sent to the local financial authority and not to the District.

#### Receiving a Fax

If the local financial authority permits public use of a District-owned fax machine, library staff collects a fee of \$1.00 per page received. Money collected for receiving a fax is sent to the District at least once a month, with the amount indicated on a receipt form.

#### Fax as a Copier

If the local financial authority permits public use of a District-owned fax machine, library staff will collect a fee of \$.35 per page copied. Money collected for using the fax machine as a copier is sent to the District at least once a month, with the amount indicated on a receipt form.

*Photocopier Machines*-Where a District-owned photocopier is available; the fee for copying is \$.10 per page copied for black and white copies. Money collected for using the photocopier is sent to the District at least once a month, with the amount indicated on a receipt form. Only library staff may operate a District-owned photocopier. The photocopier at District Headquarters is not available for public use.

If the local financial authority or an outside vendor owns the photocopier machine, the owner determines fees and operation.

All photocopying is subject to copyright laws and restrictions.

*Scanners*-Where a District owned scanner is available; the fee for using it as a copier/printer is \$.35 per page copied for black and white copies. Money collected for using the scanner is sent to the District at least once a month, with the amount indicated on a receipt form.

*Computers*-The District Library provides computer workstations for staff and public use. Computer printing from District-owned and supplied printers is \$.10 per page for black and white copies, and \$.50 per page for color copies. Money collected for using District-owned and supplied computer printers is sent to the District Library at least once a month, with the amount indicated on a receipt form.

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Digital data is subject to copyright laws and restrictions.

Administrative staff and Branch library staff must report all hardware, software, Internet provider and patron “problems” with any computers to the Iosco-Arenac District Library Director or to the Director’s designated “technical support” person.

*Internet Workstations*-Internet workstations are provided for public access during normal library branch hours with the exception of the last 15 minutes of the operating day. Use of these workstations (including time limits) is governed by written guidelines.

No one under the age of 18 will be allowed to operate, or accompany anyone operating, the public access Internet workstations without the staff-witnessed, written permission of a parent, legal guardian, or a responsible adult appointed by the parent/legal guardian. The parent, legal guardian, or parent/legal guardian appointed responsible adult must personally present written proof of identity to obtain permission for a minor to use a public workstation for Internet access. In some unusual situations, a stamped notarized statement may be substituted when a parent or legal guardian cannot be present to give written permission.

To access the Internet on a public access computer, a parent, legal guardian, or a parent/legal guardian-appointed responsible adult, must accompany children under the age of 12.

Children accessing the Internet on a District-owned public access computer without permission will have their computer privileges lost for a specified period of time identified in the guidelines.

Filtering will be installed on all Internet workstations in a “good faith” effort to comply with the Children’s Internet Protection Act (CIPA) and Michigan’s Public Act 212 of 2000. If and when CIPA and Michigan PA 212 of 2000 permit, adults may request that filtering be temporarily disabled. Information on CIPA and Michigan PA 212 of 2000 may be requested by contacting the District Director.

Internet workstations located in District Headquarters offices are for staff use only.

## **Wireless Access**

Wireless access points are filtered and available 24/7.

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## **District Library Administrative Office**

The Iosco-Arenac District Library Administrative Office (also referred to as District Headquarters) does not operate as a Public Library site. Appointments may be made by contacting District Headquarters staff in writing or by telephone, fax, or e-mail. Business hours are Monday-Friday from 8:00 a.m.-4:30 p.m.

## **District Library Board of Trustees**

The Iosco-Arenac District Library was established as a District Library November 1, 1990. The District Library operates in accordance with Michigan Public Act 24 of 1989 (District Library Establishment Act) and Michigan Public Act 265 of 1988 (District Library Financing Act), as well as being governed by various State and Federal laws, regulations, and rules. The District Library Board of Trustees is comprised of eight County Commission-appointed Board members (four from Arenac County and four from Iosco County). The District Library Board of Trustees has established written bylaws. The District Library Board of Trustees meets at least ten times per year. All meetings are open to the Public as required by the Open Meetings Act. For more information about the District Library Board of Trustees and State and Federal Laws governing the Iosco-Arenac District Library, contact the District Director in writing or by telephone, fax, or e-mail.

## **District Library Employees and Branch Support**

The District Library employs two (2) ALA/MLS (American Library Association Masters in Library Science) degreed librarians to satisfy Michigan State Aid requirements. One of these is the District Director.

The District Library employs and trains staff to serve the needs of the District Library including providing services to eight (8) library branches in the District. The eight library branches are:

- Robert J. Parks Library (Oscoda)
- East Tawas Library
- Tawas City Library
- Plainfield Township Library (Hale)
- Whittemore Library
- AuGres Community Library
- Omer Little Eagles Nest Library
- Mary Johnston Memorial Library (Standish)

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Service to the library branches includes but is not limited to:

- \*Revenue sharing of the District millage with units of government owning and operating library branches (1/2 of the actual amount received) for library operations
- \*Children and teen services and program coordination
- \*Funding for adult programs (branch allowances and District programs)
- \*Collection maintenance assistance with selection and de-selection (weeding)
- \*Marketing of the collections in-house, repairs, and recommendations for shelving and display arrangements
- \*Consulting and training (including continuing education)-includes, but is not limited to, funding for travel and lodging to State conferences (MLA and Rural Library Conference)
- \*Delivery of materials (Mel delivery five days per week, Branch Library delivery two days per week, postal delivery for ALA and OCLC)
- \*Interlibrary loan (MelCat participant, Valley Library Consortium, OCLC, ALA)-coordination of borrowing and lending of materials to fill borrower requests (Statewide, National and International)
- \*Ordering, purchasing, cataloguing and processing of intellectual property (books, CDs, magazines and local newspapers, etc.)
- \*Ordering and purchasing of equipment including computers, scanners, printers, fax machines and photocopiers
- \*Ordering, purchasing and delivery of selected library and office supplies
- \*Preparation of grant applications for library programs, services and equipment
- \*Reference assistance and referral where needed and/or requested by borrowers and branch staff
- \*Statistical recordkeeping including, but not limited to, annual State Aid reports
- \*Monitoring popular media (TV, radio, newspapers, Internet) for author tours, book discussions, upcoming publications and readers advisory
- \*Substitute staff allowances (substitute staff are District employees)
- \*Technical assistance/maintenance for computers, printers, fax machines and photocopiers (hardware and software)-full-time technical support staff
- \*Library advocacy and outreach including advertising, public speaking, monitoring legislative actions, forwarding Internet library news, and support of 1<sup>st</sup> Amendment rights
- \*District website (up-to-date links and local information)
- \*Purchase e-mail accounts for Branch Library managers
- \*Direct broadband Internet connections (Fiber, “fiber-rich” and wireless at all branches) and diagnostics
- \*OverDrive/Libby downloadable audio book and e-book consortium member
- \*Hoopla online service for downloadable/streaming movies/TV, music, comics, e-books and audio books

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- \*Troubleshooting assistance for borrowers using District computers and District automation (via telephone and the Internet, and by appointment)
- \*Automated circulation, searching, requesting, hold slip notice production, remote renewals and e-mail notifications
- \*Mailed and e-mailed notification of fines, fees and over-dues to borrowers
- \*Tax form ordering and distribution - support for the Volunteer Income Tax Assistance Program (AARP)
- \*Primary vendor contact for supplies, equipment and contracted services
- \*Opportunities for scheduled Branch Librarian meetings at different District Library locations

The Policy Manual and the Personnel Policy Manual are approved by the District Library Board of Trustees, are given to every District Library staff person, and are posted on the District website. Each Branch Library is supplied with a printed copy for staff, public and volunteer use in the library branch. Branch Library copies do not circulate. Copies of the Policy Manual and the Personnel Policy Manual may be requested from the District Director at a charge of \$.25 per page.

### **District Library Purchase, Investment, and Credit Card Policies**

*Purchase Policy*-The general purchasing policy for the Iosco-Arenac District Library shall be as follows:

All purchases with an estimated total cost of over \$10,000 require formal competitive sealed bids. The District Library Board of Trustees shall award the bid. All sealed bid solicitations shall be advertised publicly including at least once in a newspaper of general circulation at least fourteen (14) days in advance of the date announced for the opening of the bid unless time limitations prohibit.

All purchases with an estimated total cost between \$5,000 and \$10,000 require written quotations from at least three (3) prospective vendors, if available. The District Director shall approve the purchase.

All purchases estimated under \$5,000 are to be purchased using the best judgment of the District Director or designated purchasing agent as to source of supply based on the best available information. This may include quotations, either in person, in writing, by telephone, fax or e-mail, from at least three prospective vendors, if available.

All purchases made under a cooperative program with another government entity, such as a library cooperative or a governing unit operating a branch library, may be exempt from competitive bidding requirements, as the bidding process may have been previously completed under their policies. Where Federal or State bidding processes are mandated those policies and procedures will apply (Universal Service Fund for example).

The competitive bidding process shall be waived when there is only one known supplier, such as a vendor supplying for the District Library's chosen automation system.

When there is a threat to health, safety or welfare, the District Library may make emergency purchases, following the purchase policy as closely as possible under the circumstances. If such a situation happens, then written justification shall be submitted to the District Library Board of Trustees.

A petty cash checking account is maintained at \$200, for the purpose of paying small invoices or for the purchase of items exceeding \$50. The petty cash checking account is replenished at least once a month. A petty cash envelope is maintained at \$100, for the purpose of reimbursing staff for "out-of-pocket" expenses. An appropriate vendor receipt or other detailed documentation must accompany each request for reimbursement.

The District is tax-exempt.

The authority and responsibility of purchasing for the Iosco-Arenac District Library shall be under the direction of the District Director.

*Investment Policy*-The District Library Board of Trustees, in formal Board action at the April 13, 2017 regular Board meeting, reaffirmed the Investment Policy of Iosco County as the Investment Policy for the Iosco-Arenac District Library. In January 2019, it was confirmed that no changes to that policy have been made by Iosco County.

*Credit Card Policy*-Credit cards issued for the Iosco-Arenac District Library are to be used for District Library purchases only. Personal expenditures are not permitted. Credit card accounts will be limited to a general-purpose account and a gasoline account. Credit card purchases may not exceed \$3,500 without District Library Board approval.

Appropriate Credit card purchases include:

- Registration for conferences,

- Travel expenses as authorized by the District Director,

- Pre-paid purchases of goods and services as authorized by the District Director,

- Emergency vehicle repairs, and

- Other transactions of expediency subject to prior approval of the District Director.

A gasoline credit card may be kept in the delivery vehicles, and in the Administrative Assistant/Bookkeeper's file.

The general-purpose credit cards are kept in the Administrative Assistant/Bookkeeper's file. [Per banking regulations credit cards are issued to individuals designated by the District Director as authorized users]

All other District staff authorized to use the credit cards must return them to the Administrative Assistant /Bookkeeper when transactions are completed. All District staff and/or officers of the District Library Board may at some time need to make purchases for the District Library.

The ultimate responsibility for credit card issuance, accounting, monitoring, purchasing, and retrieval rests with the District Director. The Administrative Assistant/Bookkeeper for the District will collect and maintain records of all credit card purchases including invoices, receipts and statements. The employee or District Library Board officer who has a District Library credit card in his/her possession is responsible for:

- Submitting all receipts and invoices when a transaction is completed,
- Immediately notifying the District Director in the event that a credit card is lost or stolen, and,
- Returning the credit card upon the termination of his/her employment or service in office.

All credit card purchases will be paid in full within thirty (30) days of statement issuance and upon review and approval of the District Director.

The total combined authorized credit limit of all credit cards issued to the Iosco-Arenac District Library shall not exceed five percent (5%) of the total budget.

Any unauthorized use of a District Library credit card shall be subject to disciplinary measures consistent with Federal and State law.

*Annual Audit*-The District Library is subject to an annual audit of its financial records by an independent audit firm.

*Branch Library Cash-on-Hand*-The District Library provides \$30 per branch library for making change.

## **Fund Balance**

The District Library complies with the Government Accounting Standards Board (GASB) Statement No.54 in regards to the designation of excess funds. See **Fund Balance Policy (EXHIBIT 7)**

## **Electronic Fund Transfers and Direct Deposits**

The District Library is authorized to conduct both Electronic Fund transfers and payments including Direct Deposit of funds. See **Electronic Funds and Automated Clearing House Transactions Policy (EXHIBIT 4)**

## **Freedom of Information**

The District Library performs public business in an open and public manner as required by Michigan's Freedom of Information Act 442 of 1976, and as amended. See **FOIA Policy (EXHIBIT 5)**.

## **District Library Code of Ethics**

The Iosco-Arenac District Library, being a public institution, depends upon the trust of its constituents to fulfill its mission. The patrons of the District Library have a right to expect, that in fulfilling its mission, the District Library and its employees, trustees, and officers will perform their duties honestly, efficiently and economically. All District Library officials and employees must avoid conflicts between their private interests and those of the general public they serve. Therefore, an official, director, trustee or employee of the Iosco-Arenac District Library:

Shall not solicit, accept or receive, either directly or indirectly, any gift whether in the form of money, service, loan, travel, entertainment, hospitality, goods or promise, or in any form, under circumstances in which it can be reasonably inferred that the gift is intended to influence him/her in the performance of their official duties or is intended as a reward for any official act on their part,

Shall not use, or attempt to use, their official position to unreasonably secure, request or grant, any privileges, exemptions, advantages, contracts, or preferential treatment for themselves or anyone else,

Shall not use information, which by law or policy is unavailable at the time to the general public, to further the private economic interest of themselves or anyone else,

Shall not participate, as an agent or representative of the District Library, in approving, disapproving, voting, abstaining from voting, recommending or otherwise

acting upon any matter in which he/she has a direct or indirect financial interest without disclosing the full nature and extent of their interest,

Shall not engage in or accept employment or render services for a private or public interest when that employment or service is incompatible or in conflict with the discharge of the official or employee's official duties or when that employment may tend to impair his/her independence of judgment or action in the performance of official duties,

Shall not engage in a business transaction in which the public, city official, or employee may profit from his/her official position or authority or benefit financially from confidential information which he/she has obtained or may obtain by reasons of that position or authority,

Shall not suppress any District Library report, document or other information available to the general public because it might tend to affect unfavorably their private financial or political interest,

Shall not, directly or indirectly, make use of or permit others to make use of Library property of any kind for purely personal gain.

Iosco-Arenac District Library recognizes and strives to support the **American Library Association Code of Ethics (EXHIBIT 6)**.

### **Policy Manual Changes and Exclusions**

The Policy Manual is subject to change only upon formal approval of the District Library Board of Trustees at a regular or special meeting subject to the Open Meetings Act.

Where the District Library does not manage the personnel and the overhead operational costs of the Branch Library or determine the Branch Library hours of operation, the local financial authority must be contacted for policies specific to that Branch Library.



## The Freedom to Read Statement

The freedom to read is essential to our democracy. It is continuously under attack. Private groups and public authorities in various parts of the country are working to remove or limit access to reading materials, to censor content in schools, to label "controversial" views, to distribute lists of "objectionable" books or authors, and to purge libraries. These actions apparently rise from a view that our national tradition of free expression is no longer valid; that censorship and suppression are needed to counter threats to safety or national security, as well as to avoid the subversion of politics and the corruption of morals. We, as individuals devoted to reading and as librarians and publishers responsible for disseminating ideas, wish to assert the public interest in the preservation of the freedom to read.

Most attempts at suppression rest on a denial of the fundamental premise of democracy: that the ordinary individual, by exercising critical judgment, will select the good and reject the bad. We trust Americans to recognize propaganda and misinformation, and to make their own decisions about what they read and believe. We do not believe they are prepared to sacrifice their heritage of a free press in order to be "protected" against what others think may be bad for them. We believe they still favor free enterprise in ideas and expression.

These efforts at suppression are related to a larger pattern of pressures being brought against education, the press, art and images, films, broadcast media, and the Internet. The problem is not only one of actual censorship. The shadow of fear cast by these pressures leads, we suspect, to an even larger voluntary curtailment of expression by those who seek to avoid controversy or unwelcome scrutiny by government officials.

Such pressure toward conformity is perhaps natural to a time of accelerated change. And yet suppression is never more dangerous than in such a time of social tension. Freedom has given the United States the elasticity to endure strain. Freedom keeps open the path of novel and creative solutions, and enables change to come by choice. Every silencing of a heresy, every enforcement of an orthodoxy, diminishes the toughness and resilience of our society and leaves it the less able to deal with controversy and difference.

Now as always in our history, reading is among our greatest freedoms. The freedom to read and write is almost the only means for making generally available ideas or manners of expression that can initially command only a small audience. The written word is the natural medium for the new idea and the untried voice from which come the original contributions to social growth. It is essential to the extended discussion that serious thought requires, and to the accumulation of knowledge and ideas into organized collections.

We believe that free communication is essential to the preservation of a free society and a creative culture. We believe that these pressures toward conformity present the danger of limiting the range and variety of inquiry and expression on which our democracy and our culture depend. We believe that every American community must jealously guard the freedom to publish and to circulate, in order to preserve its own freedom to read. We believe that publishers and librarians have a profound responsibility to give validity to that freedom to read by making it possible for the readers to choose freely from a variety of offerings.

**Approved and Adopted at the Regular Board Meeting of  
the Iosco-Arenac District Library Board of Trustees August 11, 2022  
Effective August 11, 2022**

The freedom to read is guaranteed by the Constitution. Those with faith in free people will stand firm on these constitutional guarantees of essential rights and will exercise the responsibilities that accompany these rights.

We therefore affirm these propositions:

1. *It is in the public interest for publishers and librarians to make available the widest diversity of views and expressions, including those that are unorthodox, unpopular, or considered dangerous by the majority.*

Creative thought is by definition new, and what is new is different. The bearer of every new thought is a rebel until that idea is refined and tested. Totalitarian systems attempt to maintain themselves in power by the ruthless suppression of any concept that challenges the established orthodoxy. The power of a democratic system to adapt to change is vastly strengthened by the freedom of its citizens to choose widely from among conflicting opinions offered freely to them. To stifle every nonconformist idea at birth would mark the end of the democratic process. Furthermore, only through the constant activity of weighing and selecting can the democratic mind attain the strength demanded by times like these. We need to know not only what we believe but why we believe it.

2. *Publishers, librarians, and booksellers do not need to endorse every idea or presentation they make available. It would conflict with the public interest for them to establish their own political, moral, or aesthetic views as a standard for determining what should be published or circulated.*

Publishers and librarians serve the educational process by helping to make available knowledge and ideas required for the growth of the mind and the increase of learning. They do not foster education by imposing as mentors the patterns of their own thought. The people should have the freedom to read and consider a broader range of ideas than those that may be held by any single librarian or publisher or government or church. It is wrong that what one can read should be confined to what another thinks proper.

3. *It is contrary to the public interest for publishers or librarians to bar access to writings on the basis of the personal history or political affiliations of the author.*

No art or literature can flourish if it is to be measured by the political views or private lives of its creators. No society of free people can flourish that draws up lists of writers to whom it will not listen, whatever they may have to say.

4. *There is no place in our society for efforts to coerce the taste of others, to confine adults to the reading matter deemed suitable for adolescents, or to inhibit the efforts of writers to achieve artistic expression.*

To some, much of modern expression is shocking. But is not much of life itself shocking? We cut off literature at the source if we prevent writers from dealing with the stuff of life. Parents and teachers have a responsibility to prepare the young to meet the diversity of experiences in life to which they will be exposed, as they have a responsibility to help them learn to think critically for themselves. These are affirmative responsibilities, not to be discharged simply by preventing them from reading works for which they are not yet prepared. In these matters values differ, and values cannot be legislated; nor can machinery be devised that will suit the demands of one group without limiting the freedom of others.

5. *It is not in the public interest to force a reader to accept the prejudgment of a label characterizing any expression or its author as subversive or dangerous.*

**Approved and Adopted at the Regular Board Meeting of  
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Effective August 11, 2022**



The ideal of labeling presupposes the existence of individuals or groups with wisdom to determine by authority what is good or bad for others. It presupposes that individuals must be directed in making up their minds about the ideas they examine. But Americans do not need others to do their thinking for them.

6. *It is the responsibility of publishers and librarians, as guardians of the people's freedom to read, to contest encroachments upon that freedom by individuals or groups seeking to impose their own standards or tastes upon the community at large; and by the government whenever it seeks to reduce or deny public access to public information.*

It is inevitable in the give and take of the democratic process that the political, the moral, or the aesthetic concepts of an individual or group will occasionally collide with those of another individual or group. In a free society individuals are free to determine for themselves what they wish to read, and each group is free to determine what it will recommend to its freely associated members. But no group has the right to take the law into its own hands, and to impose its own concept of politics or morality upon other members of a democratic society. Freedom is no freedom if it is accorded only to the accepted and the inoffensive. Further, democratic societies are more safe, free, and creative when the free flow of public information is not restricted by governmental prerogative or self-censorship.

7. *It is the responsibility of publishers and librarians to give full meaning to the freedom to read by providing books that enrich the quality and diversity of thought and expression. By the exercise of this affirmative responsibility, they can demonstrate that the answer to a "bad" book is a good one, the answer to a "bad" idea is a good one.*

The freedom to read is of little consequence when the reader cannot obtain matter fit for that reader's purpose. What is needed is not only the absence of restraint, but the positive provision of opportunity for the people to read the best that has been thought and said. Books are the major channel by which the intellectual inheritance is handed down, and the principal means of its testing and growth. The defense of the freedom to read requires of all publishers and librarians the utmost of their faculties, and deserves of all Americans the fullest of their support.

We state these propositions neither lightly nor as easy generalizations. We here stake out a lofty claim for the value of the written word. We do so because we believe that it is possessed of enormous variety and usefulness, worthy of cherishing and keeping free. We realize that the application of these propositions may mean the dissemination of ideas and manners of expression that are repugnant to many persons. We do not state these propositions in the comfortable belief that what people read is unimportant. We believe rather that what people read is deeply important; that ideas can be dangerous; but that the suppression of ideas is fatal to a democratic society. Freedom itself is a dangerous way of life, but it is ours.

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This statement was originally issued in May of 1953 by the Westchester Conference of the American Library Association and the American Book Publishers Council, which in 1970 consolidated with the American Educational Publishers Institute to become the Association of American Publishers.

Adopted June 25, 1953, by the ALA Council and the AAP Freedom to Read Committee; amended January 28, 1972; January 16, 1991; July 12, 2000; June 30, 2004.

**Approved and Adopted at the Regular Board Meeting of  
the Iosco-Arenac District Library Board of Trustees August 11, 2022  
Effective August 11, 2022**

## Library Bill of Rights

The American Library Association affirms that all libraries are forums for information and ideas, and that the following basic policies should guide their services.

- I. Books and other library resources should be provided for the interest, information, and enlightenment of all people of the community the library serves. Materials should not be excluded because of the origin, background, or views of those contributing to their creation.
- II. Libraries should provide materials and information presenting all points of view on current and historical issues. Materials should not be proscribed or removed because of partisan or doctrinal disapproval.
- III. Libraries should challenge censorship in the fulfillment of their responsibility to provide information and enlightenment.
- IV. Libraries should cooperate with all persons and groups concerned with resisting abridgment of free expression and free access to ideas.
- V. A person's right to use a library should not be denied or abridged because of origin, age, background, or views.
- VI. Libraries which make exhibit spaces and meeting rooms available to the public they serve should make such facilities available on an equitable basis, regardless of the beliefs or affiliations of individuals or groups requesting their use.
- VII. All people, regardless of origin, age, background, or views, possess a right to privacy and confidentiality in their library use. Libraries should advocate for, educate about, and protect people's privacy, safeguarding all library use data, including personally identifiable information.

Adopted June 19, 1939, by the ALA Council; amended October 14, 1944; June 18, 1948; February 2, 1961; June 27, 1967; January 23, 1980; January 29, 2019.

Inclusion of "age" reaffirmed January 23, 1996.

Although the Articles of the *Library Bill of Rights* are unambiguous statements of basic principles that should govern the service of all libraries, questions do arise concerning application of these principles to specific library practices. See the documents designated by the Intellectual Freedom Committee as Interpretations of the Library Bill of Rights.

**Approved and Adopted at the Regular Board Meeting of  
the Iosco-Arenac District Library Board of Trustees August 11, 2022  
Effective August 11, 2022**

**IOSCO-ARENAC DISTRICT LIBRARY**

120 W. WESTOVER STREET, EAST TAWAS, MI 48730 (989) 362-2651 FAX (989) 362-6056

**REQUEST FOR RECONSIDERATION OF LIBRARY MATERIAL**

Requester: \_\_\_\_\_ Telephone: \_\_\_\_\_

Address: \_\_\_\_\_

Requester represents (Please check one):

Himself/Herself

Group or Organization \_\_\_\_\_  
Name of Group or Organization

Address \_\_\_\_\_

Please circle type of material the request represents.

BOOK          AUDIO/CD          DVD          PERIODICAL          OTHER

Author: \_\_\_\_\_ Title: \_\_\_\_\_

1. Did you read, view or listen to all of the material? (Circle one)          Yes          No  
If not, what parts did you read, view or listen to? \_\_\_\_\_

2. Why do you object to this material? \_\_\_\_\_

3. What do you specifically object to in the material? \_\_\_\_\_

4. What do you feel might be the result of reading, viewing or listening to this material? \_\_\_\_\_

5. What action do you wish the District Library to take? \_\_\_\_\_

6. Are you usually able to find what you want in the library? (Circle one)          Yes          No  
If not, what material(s) would you like to be able to find in the library? \_\_\_\_\_

Requester's Signature

Date

**Approved and Adopted at the Regular Board Meeting of  
the Iosco-Arenac District Library Board of Trustees August 11, 2022  
Effective August 11, 2022**

## Electronic Funds and Automated Clearing House Transactions Policy

A policy which authorizes and regulates disbursement or receipt of funds by the Iosco-Arenac District Library via Electronic Fund Transactions and Automated Clearing Houses. This policy also applies to movement of funds between the Iosco-Arenac District Library organizations that have authority to process electronic payments, and to provide for powers and duties of the officials that will act on behalf of the Iosco-Arenac District Library.

### 1. Definitions

“Automated Clearing House” or “ACH” means a national and governmental organization that has authority to process electronic payments.

“ACH Arrangement” means an agreement between the originator of the ACH transaction and the receiver of an ACH transaction.

“ACH Transaction” means use of Electronic Fund Transactions for executing payment, debit or credit transfers which are processed through an automated clearing house.

“ACH Policy” means the procedures and internal controls as determined under this written policy which has been adopted by the Iosco-Arenac District Library Board of Trustees.

“Bookkeeper” means the individual or firm designated by the District to prepare payroll, accounts payable, accounts receivable, documents in support of satisfying state and federal reporting requirements and to maintain the accumulation of day-to-day financial records for the Iosco-Arenac District Library.

“Electronic Transaction Officer” or “ETO” shall be the person that the Board has elected to serve as Treasurer. The ETO shall oversee and ensure that ACH transactions are executed in compliance with this policy.

“Electronic Funds Transaction” or “EFT” is the electronic exchange or transfer of money from one account to another, either within a single financial institution or across multiple institutions, through computer-based systems.

“Treasurer” shall be the person that the Board annually elects to keep account of all monies received and disbursed in such manner and for such purposes as approved and authorized by the Board.

### 2. Authority to Enter into ACH Agreements and Electronic Transfer of Public Funds

In accordance with any legal requirements of the local, state or federal law, the Board has adopted a Resolution which authorizes the District Director and Treasurer to enroll the Iosco-Arenac District Library into ACH Arrangements and authorizes use of Electronic Fund Transactions for executing payment, debit or credit transfers which are processed through an ACH when such actions conform with this policy.

### 3. Responsibility for ACH Agreements

Approved and Adopted at the Regular Board Meeting of  
the Iosco-Arenac District Library Board of Trustees August 11, 2022  
Effective August 11, 2022

The Board designates the District Director and the Treasurer to be responsible for ACH Arrangements and for generally overseeing compliance with this ACH Policy. The District Director is also responsible for submitting documentation to the Board which provides details about the goods or services purchased, the cost of such goods or services, the date of payment, and the projects which have caused the District to incur expenses or receive revenues via ACH Arrangements all in accordance with relevant law. EFT and ACH payment activities will be reported to the Board as part of the financial report that is delivered during each scheduled meeting.

#### 4. Internal Accounting Controls for use of EFT and ACH Transactions

Pre-Approved Payees and Payment Limits: The Bookkeeper shall prepare a list, for pre-approval by the District Director, of all vendors, ACH Arrangements and other agencies that are to receive payments from Iosco-Arenac District Library via Electronic Fund Transactions and ACH Arrangements (the ‘Payees’) - - on a regular or on-going basis. This list shall also define the not-to-exceed amounts for which the Bookkeeper, District Director and Treasurer may process and execute payments. The District Director will seek specific approval from the Board prior to making any payments that exceed the pre-approved limit or in preparation for making EFT or ACH payments to Payees that have not been listed on the pre-approved list.

Reporting EFT and ACH Activities to the Board: All EFT and ACH payment activities will be reported to the Board at the next scheduled meeting following execution of such payments. These reports will be provided to the Board as part of the financial report that is delivered during each scheduled meeting.

Paying State and Federal Payroll Taxes: For payment of state and federal payroll taxes and other payroll liabilities - - the Bookkeeper has authority to make such payments via the established Electronic Federal Tax Payment System (EFTPA) and the State of Michigan program.

Receiving EFT & ACH Deposits: When Deposits from State, County, and/or Federal authorities, and from third-party payment processors, e.g. banks, vendors, are received - - the Bookkeeper shall obtain the amount of the deposit for recording and accounting purposes.

During a regularly scheduled meeting, conducted on February 9, 2017, the Iosco-Arenac District Library Board of Trustees approved a Resolution making this policy effective immediately.

## **FOIA Policy Iosco-Arenac District Library**

### **I. Purpose**

It is the intent of the Iosco-Arenac District Library to perform public business in an open and public manner as required by Michigan's Freedom of Information, Act 442 of 1976, and as amended. This Policy prescribes the District's procedures for responding to written public records requests made pursuant to FOIA.

### **II. Scope**

This Policy applies to the District whenever a written request for public records is made under Michigan's FOIA law. This Policy does not apply to any records that are exempt from disclosure such as, but not limited to:

- Specific personal information about an individual if the release would constitute a clearly unwarranted invasion of that individual's privacy.
- Records that may be exempted from disclosure by another statute. (Note: statutes which expressly prohibit public disclosure of records generally supersede the FOIA.)
- Information subject to attorney-client privilege.
- Pending public bids to enter into contracts.
- Records that would disclose the social security number of an individual.

#### **A. Access**

Public records shall be open to inspection and copying during the District's regular business hours by the custodian of the requested public records. Reasonable access to and reasonable facilities for copying of these records shall be provided. The District shall provide reasonable assistance in identifying and locating public-records in accordance with this Policy.

#### **B. Form of FOIA Requests**

All FOIA requests shall be made in writing.

All FOIA requests shall adequately describe the records sought in sufficient detail to enable the District to locate such records with reasonable effort. The requesting party shall be as specific as possible when requesting records. To assist the District in locating the requested records, the District may request that the requesting party provide additional information known to the requesting party, such as the types of records, dates, parties to correspondence, and subject matter of the requested records.

**Approved and Adopted at the Regular Board Meeting of  
the Iosco-Arenac District Library Board of Trustees August 11, 2022  
Effective August 11, 2022**

A FOIA request will be answered within 5 business days after receiving it. If needed, the District will notify the requester in writing and extend the time for an additional 10 business days.

Fees: Fees may be charged as permitted by law.

\$.10 per sheet

Hourly rate for searching, reproducing and postage will be set according to  
2015 PA 563

If a request must be denied, the District will respond to the requester with an explanation of the reasons for the denial and the requester's right to submit a written appeal to the head of the public body (Board Chair) or to seek judicial review with the right to receive attorney fees and collect damages.

**C. Submit requests to:**

**District Director**

**120 W. Westover St.**

**East Tawas MI 48730**

**[Director@ioscoarenaclibrary.org](mailto:Director@ioscoarenaclibrary.org)**

*Approved at the June 11, 2015 Regular meeting of the Iosco-Arenac District Library Board of Trustees*

## **Code of Ethics of the American Library Association**

As members of the American Library Association, we recognize the importance of codifying and making known to the profession and to the general public the ethical principles that guide the work of librarians, other professionals providing information services, library trustees and library staffs.

Ethical dilemmas occur when values are in conflict. The American Library Association Code of Ethics states the values to which we are committed, and embodies the ethical responsibilities of the profession in this changing information environment.

We significantly influence or control the selection, organization, preservation, and dissemination of information. In a political system grounded in an informed citizenry, we are members of a profession explicitly committed to intellectual freedom and the freedom of access to information. We have a special obligation to ensure the free flow of information and ideas to present and future generations.

The principles of this Code are expressed in broad statements to guide ethical decision making. These statements provide a framework; they cannot and do not dictate conduct to cover particular situations.

- I.** We provide the highest level of service to all library users through appropriate and usefully organized resources; equitable service policies; equitable access; and accurate, unbiased, and courteous responses to all requests.
- II.** We uphold the principles of intellectual freedom and resist all efforts to censor library resources.
- III.** We protect each library user's right to privacy and confidentiality with respect to information sought or received and resources consulted, borrowed, acquired or transmitted.
- IV.** We respect intellectual property rights and advocate balance between the interests of information users and rights holders.
- V.** We treat co-workers and other colleagues with respect, fairness, and good faith, and advocate conditions of employment that safeguard the rights and welfare of all employees of our institutions.
- VI.** We do not advance private interests at the expense of library users, colleagues, or our employing institutions.
- VII.** We distinguish between our personal convictions and professional duties and do not allow our personal beliefs to interfere with fair representation of the aims of our institutions or the provision of access to their information resources.
- VIII.** We strive for excellence in the profession by maintaining and enhancing our own knowledge and skills, by encouraging the professional development of coworkers, and by fostering the aspirations of potential members of the profession.
- IX.** We affirm the inherent dignity and rights of every person. We work to recognize and dismantle systemic and individual biases; to confront inequity and oppression; to enhance diversity and inclusion; and to advance racial and social justice in our libraries, communities, profession, and associations through awareness, advocacy, education, collaboration, services, and allocation of resources and spaces.

Adopted at the 1939 Midwinter Meeting by the ALA Council; amended June 30, 1981; June 28, 1995; and January 22, 2008.

**Approved and Adopted at the Regular Board Meeting of  
the Iosco-Arenac District Library Board of Trustees August 11, 2022  
Effective August 11, 2022**



IOSCO-ARENAC DISTRICT LIBRARY  
FUND BALANCE POLICY  
ADOPTED BY IOSCO-ARENAC DISTRICT LIBRARY BOARD OF TRUSTEES  
October 13, 2011

**Purpose**

To establish an appropriate level of fund balance in the General Fund, define the components of fund balance, and direct officials in the methods to be used for increasing or decreasing fund balance when trends indicate fund balance will fall outside the minimum/maximum levels in compliance with Government Accounting Standards Board (GASB) Statement No. 54.

**Policy**

Fund balance is created from excess revenues over expenditures. It is a fund's net assets, mostly made up of cash and investments and, unless otherwise restricted, available for spending. There are five components of fund balance:

1. **Non-spendable Fund Balance.** This portion of fund balance is *non-spendable* because of its form, for example inventory and non-financial assets, or because of legal or contractual requirements.
2. **Restricted Fund Balance.** This portion of fund balance is *restricted* due to external limitations placed on the use of the funds. The restriction typically comes from outside the local government as a condition of the revenue source.
3. **Committed Fund Balance.** Fund balance is *committed* if a limitation is set in place by formal action (a motion is moved, seconded and approved) of the Board of Trustees prior to the end of the fiscal year. The limitation remains binding until the Board of Trustees takes formal action (a motion is moved, seconded and approved) to remove it.
4. **Assigned Fund Balance.** Fund balance may be *assigned* to reflect the intended use of the resource. The assignment of funds may come from the Board of Trustees or its designee, the District Director. Less formality is needed to impose, remove, or modify a constraint reflected in *Assigned Fund Balance*. No funds other than the General Fund may have Unassigned Fund Balance, therefore any amounts remaining in excess of Non-spendable, Restricted, or Committed funds in funds other than the General Fund will automatically be reported as *Assigned Fund Balance*. If any portion of existing fund balance will be used to eliminate a projected deficit in the subsequent year's budget, this amount will also be categorized as *Assigned Fund Balance*.
5. **Unassigned Fund Balance.** The General Fund, and no other governmental fund, may have resources that cannot be classified in one of the four categories described above. Only the General Fund can report a surplus, an *Unassigned Fund Balance*.

Because Non-spendable and Restricted fund balance are not available for spending due to external enforceable conditions this fund balance policy is focused on the appropriate level of General Fund Unrestricted fund balances, those classified as Committed, Assigned, and Unassigned.

**Approved and Adopted at the Regular Board Meeting of  
the Iosco-Arenac District Library Board of Trustees August 11, 2022  
Effective August 11, 2022**

## EXHIBIT 7

Financial flexibility, provided by adequate fund balance, is needed to cushion the impact of unanticipated emergencies and revenue shortfalls. These include loss of major taxpayers, reduced state and penal fine funds, infrastructure emergencies and other economic distresses that serve to impair the District's ability to deliver essential community services. Without this cushion taxpayers would be subject to millage increases, cuts in services, and/or deferred investment in and maintenance of infrastructure. The District Director is authorized to recommend fund balance in support of Board goals.

### **Fund Balance "Spending" Prioritization**

As required by GASB 54, the Board of Trustees hereby establishes that the District's policy shall be that when multiple classifications are available and appropriate for particular expenditures, the most restrictive category of Fund Balance will be used first working toward unassigned fund balance. Relative restrictiveness of Fund Balance shall proceed from most to least in order of the five classifications listed in this policy, from one to five above.