

SHAKER HEIGHTS PUBLIC LIBRARY  
Board of Trustees  
Regular Meeting  
Wednesday, September 15, 2010

Attendance

Members Present: Ms. Allen, Mr. McGovern, Mr. Miller, Dr. Whyte  
Members Absent: Mr. Anderson, Dr. Hutt, Ms. Shatten  
Staff Present: Mr. Dickinson, Mr. Piskac, Ms. Switzer  
Others: Evelyn Krent, League of Women Voters Representative

Dr. Whyte called the regular meeting of the Shaker Heights Public Library Board of Trustees to order at 8:10 a.m. in the Main Library Boardroom.

Approval of Minutes

Dr. Whyte asked for a motion to approve the June 15, 2010 regular meeting minutes.

2010-63 Mr. McGovern moved and Mr. Miller seconded the motion to approve the June 15, 2010 regular meeting minutes.

Roll Call: Ayes: Ms. Allen, Mr. McGovern, Mr. Miller, Dr. Whyte  
Nays: None. Motion carried.

Staff Presentation – John Harchar, Maintenance Services

Mr. Dickinson said the staff presentation by Mr. Harchar was canceled and would be rescheduled.

Fiscal Officer's Report

A. Financial Statements

Mr. Piskac reviewed the highlights from the June and July financial activities and reported in detail the following August 2010 revenue and expenditure financial statements:

Revenue Summary

- Mr. Piskac reported year-to-date revenue was \$4,252,640.72 (\$4,511,575.94 – 2009), which is \$268,935.22 lower than 2009 revenue.
- Mr. Piskac reported August PLF was \$5,069.47 more than August 2009 and the year-to-date PLF receipts were \$121,990.35 less than 2009. Mr. Dickinson reviewed comparable prior year PLF receipts and said actual Library receipts are approximately 0.7% less than the State current year estimate. Mr. Dickinson said the PLF funding trend appears to be improving over last year. Mr. Piskac said the September 2010 PLF receipt was slightly higher than September 2009 receipt which suggests PLF funding has at least stabilized for now, but he still expressed concern the overall State budget deficit will have on Library funding and the next State biennium budget.

Mr. Piskac also said while PLF funding is tentatively projected to hit the State estimate, the overall PLF funding level has decreased from last year.

- He reported year-to-date Real Estate Property Tax was \$79,175.86 higher than estimates and said there was a reconciling real estate advance, which should be received later this month.
- He reported meeting room revenue was approximately \$3,000 higher than this time last year primarily due to implementing the Evanced online meeting room software last year.
- The Refunds and Reimbursements were higher due to the closing of Fifth Third payroll and FSA accounts. He said the cash from those two accounts was transferred back to the Fifth Third operating account. He reported the new PNC Bank payroll account was established with \$5,000 from the PNC Bank operating account. He said the FSA balance would be transferred once it is reconciled.
- The \$10,000 advance to the MyCom grant, Fund 212, was returned as discussed at the June Board meeting.

### Expenditure Summary

- Mr. Piskac reported year-to-date expenditures were \$3,284,445.09 (\$3,754,246.04 – 2009), which is \$469,800.95 less than 2009. He said the Salaries expenditure line item was approximately \$316,491.23 less than last year. He said \$110,000 of the amount was related to the three pay January month during 2009, \$13,000 in furlough days, and approximately \$60,000 in early retirement wage savings during 2010. He said the remaining \$133,500 (rounded) was due to unfilled positions, reduced Sunday hours and non-full time employee schedules.
- He reported the August Retirement Benefits was higher due to the three pay reporting period for the month of July.
- He said the Library health insurance was approximately \$25,000 less than last year due to changes in the HRA coverage.
- He reported overall supply expenditures were less than last year.
- He reported the year-to-date Books and Pamphlets and Audiovisual Materials expenditure line items totaled \$223,446 in comparison to the \$496,636 annual budget. He said the total spent was approximately 45%, which indicates the Materials budget is spending at May levels. In addition, he reported the year-to-date expenditures for these accounts were approximately \$117,000 less than 2009. He also said that he spoke with Ms. Loraine Lamont regarding the under spending and projected expenditures for the year, which would result in a significant budgetary under spending for the Materials budget. Ms. Lamont said she would discuss these budgetary concerns with staff that buy the items. Mr. Miller commented that the Library Materials budget was reduced \$30,000 by the Board and noted current year spending is far below the Board reduction level.

### Bank Reports

Mr. Piskac reported the month-to-date deposits of \$141,284.16 were \$227,845.05 less than month-to-date withdrawals of \$359,129.21. He also reported the year-to-date deposits of \$4,242,640.72 were \$958,195.63 greater than year-to-date withdrawals of \$3,284,445.09. He said the \$1,781,513.20 ending cash balance is due to the recent July Real Estate advances and will decrease for the remaining calendar months.

### Combined Month-to-Date/Year-to-Date Fund Report

Mr. Piskac reported the General Fund had an unexpended balance of \$1,711,088.92, \$856,551.73 in encumbrances, and an unencumbered balance of \$854,537.19. Mr. Piskac also reported the unexpended balance for all funds was \$1,781,513.20, \$885,491.19 in encumbrances, and

\$896,022.01 in unencumbered funds. Mr. Piskac said Fund 212 has a negative balance due to recent expenditures under the new MyCom grant and the return of the advance for the prior MyCom grant. He said the MyCom grants are all accounted for in Fund 212.

#### Investment Report

Mr. Piskac reported the August 2010 investment balance was \$1,539,411.42 and the Star Ohio interest rate increased to 0.13% from 0.11% in July. He said the Star Ohio Main account was receiving all Real Estate and PLF ACH receipts and amounts would be wired to the PNC Bank Operating account as needed for accounts payable and payroll. Mr. Piskac said the Library would be able to save some bank fees by not having all the outside wires deposited directly into the PNC account, because Star Ohio does not charge wire fees.

Mr. Piskac recommended the Board of Trustees approve the June 30, July 31, and August 31, 2010 financial statements as submitted.

2010-64 Mr. McGovern moved and Mr. Miller seconded the motion to accept the June 30, July 31, and August 31, 2010 financial statements.

Roll Call: Ayes: Ms. Allen, Mr. McGovern, Mr. Miller, Dr. Whyte

Nays: None. Motion carried.

#### B. Annual Library Budget Hearing

Mr. Piskac reported that the Annual Library Budget Hearing would be held Thursday, September 30, 2010 at the Cuyahoga County Public Library Brecksville Branch. He and Mr. Dickinson will attend.

#### C. Cleveland Foundation Report

Mr. Piskac reported that as of June 30, 2010, the Cleveland Foundation Endowment Fund had a \$121,284.16 ending balance. He noted that the Unrealized Gains/Losses line item shows a \$3,200.04 loss and the overall net change to Net Assets was negative \$2,708.26. He said that the fund is fluctuating slightly within the gain/loss range over the past several months due to changes in economic activity. Mr. Piskac said Ms. Judy Som from the Cleveland Foundation recommended the Board consider a Planned Giving Committee to help attract additional donors.

#### Director's Report

##### A. Written Report

- Mr. Dickinson provided a summary of meetings he attended.

##### B. Construction Bid Recommendation

Mr. Dickinson said Mr. Duane Van Dyke of Van Dyke Architects, L.L.C. submitted a recommendation letter to Dr. Kreiner of the Shaker Heights City Schools regarding the August 23 bid opening. Mr. Van Dyke recommended the Sterling Professional Group be accepted and approved for the base bid. Mr. Dickinson said there was a bidding concern on behalf of the school bond attorney regarding the bid alternatives. Mr. Dickinson said he was working with Mr. Van Dyke and the Schools to work out the concerns.

### C. OLC Funding Update

Mr. Dickinson reviewed the OLC summary of Public Library Bond and Levy issues on the November 2 ballot. He said 33 out of the 35 levies on the ballot are seeking new or additional funding, which is a result of the ongoing decrease of State funding for libraries.

### D. Grants Update

Mr. Dickinson reviewed a summary of the ten MyCom grants received since 2008. He said the Library received approximately \$73,000 and the Shaker Heights community received over \$500,000. He said the Library is going to start the most recent \$20,000 grant on October 1. Mr. Dickinson said the Library recently learned the Connect Ohio grant was approved for computer training and some equipment. Mr. Dickinson reported the Library also learned the \$50,000 CEO grant through the State Library was approved. He said the funding would be used to equip the new Shaker Library Community Entrepreneurial Office. Mr. Piskac said the Library has a 25% matching requirement for the grant. Mr. Dickinson also said the Friends of the Library approved a \$42,000 budget for the Library this fiscal year and said the Friends support is very valuable to the Library especially during these economic times. He said the Friends budget included \$10,000 for a new service desk for the Children's department at Main.

### E. Budget Reduction Recommendations

Mr. Dickinson recommended the following 2011 budget reduction be approved as submitted.

#### **Volunteer Separation Plan**

Eligible staff that resign or retire by December 31, 2010 will receive an incentive payment of 25% of his/her annual salary in the last 12 months, plus any accrued vacation. Staff eligible for OPERS retirement with 10 years of service to Shaker Heights Public Library will also receive a payment of 25% of his/her accrued sick time.

Staff will have the month of October 2010 to decide whether to participate in the incentive. A completed form must be received by the Human Resources Coordinator by November 1, 2010.

Staff must give a minimum of 30 days notice, but must leave no later than December 31, 2010.

Staff who resign or retire under the incentive will not be eligible to reapply for employment with the Shaker Library until January 2013.

#### **Eligibility**

Staff must have a minimum of 15 years service with the Shaker Heights Public Library *or* be eligible to retire under OPERS, which may include service credit from other organizations.

2010-65 Ms. Allen moved and Mr. McGovern seconded the motion to accept the budget reduction recommendation.

Roll Call: Ayes: Ms. Allen, Mr. McGovern, Mr. Miller, Dr. Whyte

Nays: None. Motion carried.

## F. 2011 Calendars

Mr. Dickinson reviewed the 2011 Board of Trustees meeting schedule, Staff Presentations to the Board of Trustees schedule and the Holiday Schedule and Hours of Operation. Mr. Dickinson said the Tuesday Board of Trustees meeting day will continue for 2011. Ms. Allen asked Mr. Dickinson if he anticipates any scheduling conflicts with the September Board meeting. Mr. Dickinson said he was not aware of any scheduling conflicts, but would double check. Mr. Dickinson reviewed the Staff Presentation schedule and then the Holiday Schedule and Hours of Operation. He said furlough days were spread out further apart and not around the winter holidays. Ms. Switzer stated the April furlough days count as one furlough day for staff. She said staff are scheduled for either Friday or Saturday so each staff member would be off for one unpaid furlough day.

Mr. Dickinson recommended the Board of Trustees approve the 2011 Board of Trustees meeting schedule, Staff Presentations to the Board of Trustees schedule, and the Holiday Schedule and Hours of Operation as submitted.

2010-66 Ms. Allen moved and Mr. McGovern seconded the motion to approve the 2011 Board of Trustees meeting schedule, Staff Presentations to the Board of Trustees schedule, and the Holiday Schedule and Hours of Operation as submitted.

Roll Call: Ayes: Ms. Allen, Mr. McGovern, Mr. Miller, Dr. Whyte

Nays: None. Motion carried.

## G. Circulation, Reference, and Information Policies, 2nd Review

Mr. Dickinson said the revised Circulation, Reference, and Information Policies were reviewed at the June Board meeting. He asked Ms. Switzer if she had any additional comments since the June meeting. Ms. Switzer said the revisions include a customer request for renewing TV shows one time. She also said that CPL and others are also using the same material recovery service and no refunds are going to be provided once an account reaches collection status.

Mr. Dickinson recommended the Board of Trustees approve the Circulation, Reference, and Information Policies as submitted.

2010-67 Ms. Allen moved and Mr. McGovern seconded the motion to approve the Circulation, Reference, and Information Policies as submitted.

Roll Call: Ayes: Ms. Allen, Mr. McGovern, Mr. Miller, Dr. Whyte

Nays: None. Motion carried.

## H. Personnel Manual, 1st Review

Mr. Dickinson said Library staff invested a lot of time reviewing and revising the Personnel Manual. He said the red text indicates a change in the policy and said a summary sheet of changes was included with the personnel manual for easier reference. Mr. Dickinson asked Ms. Switzer for any comments. Ms. Switzer said the revised personnel manual contains clarification for "at-will" and the discipline process, which were comparable to OLC recommendations. Ms. Switzer said Section 750 of the manual was rewritten to provide expectations for employee conduct. Lastly, Ms. Switzer said other clarifications included special events compensation and holiday pay. Mr. Dickinson asked

Board members to review the Personnel Manual revisions for approval at the October Board meeting.

I. Resolution of Commendation for John Harchar

Mr. Dickinson recommended the Board of Trustees approve a Resolution of Commendation for Mr. John Harchar for twenty-five years of service with the Library as submitted.

2010-68 Ms. Allen moved and Mr. McGovern seconded the motion to approve a Resolution of Commendation for Mr. John Harchar for twenty-five years of service with the Library as submitted.

Roll Call: Ayes: Ms. Allen, Mr. McGovern, Mr. Miller, Dr. Whyte

Nays: None. Motion carried.

J. Resolution of Commendation for Bill Neal

Mr. Dickinson recommended the Board of Trustees approve a Resolution of Commendation for Mr. Bill Neal for his six years of service with the Library before his untimely death on August 1 as submitted.

2010-69 Ms. Allen moved and Mr. McGovern seconded the motion to approve a Resolution of Commendation for Mr. Bill Neal for his six years of service with the Library before his untimely death on August 1 as submitted.

Roll Call: Ayes: Ms. Allen, Mr. McGovern, Mr. Miller, Dr. Whyte

Nays: None. Motion carried.

K. Open the Library on Sunday, November 28, 2010

Mr. Dickinson said the Library is scheduled to be closed from Thursday, November 25 through Sunday November 28. He recommends the Library be open Sunday, November 28 to accommodate our customers for the extended weekend and to help alleviate the backlog of returned Library material.

2010-70 Mr. Miller moved and Ms. Allen seconded the motion to open the Library on Sunday, November 28, 2010.

Roll Call: Ayes: Ms. Allen, Mr. McGovern, Mr. Miller, Dr. Whyte

Nays: None. Motion carried.

New Business

A. Gifts to be accepted and appropriated to the designated funds

Bertram Woods Branch 50th Anniversary Supporters	
Drs. Tom and Abby Abelson	\$30.00
Judith Allen	\$30.00
Carol Bates	\$30.00

Meghan Bhatia	\$5.00
Reverend Daniel Budd	\$30.00
Diane Burgin and David Hutt	\$125.00
Faith and Andrew Chakalis	\$50.00
Shawn and Luren Dickinson	\$30.00
Kristen Drake	\$15.00
Patricia Eaton	\$15.00
Joanne Federman	\$15.00
Nina Gibans	\$20.00
Patricia Harvey	\$15.00
Sharon Heslin	\$40.00
Maxine Jacqmin	\$10.00
Alyce Krantz	\$5.00
Evelyn Krent	\$30.00
Patti and Richard Lawrence	\$50.00
Earl Leiken	\$15.00
Jennifer and Walter Lesch	\$30.00
Ken and Mary Lynne McGovern	\$30.00
Lynne Miller	\$15.00
Nancy Moore	\$15.00
Rosemary Nugent	\$15.00
David Piskac	\$15.00
Amy Reed	\$10.00
Laurie Rosenberg	\$15.00
Lynn Ruffner	\$15.00
Barbara and Aaron Saltzman	\$45.00
Susan and Larry Scheps	\$50.00
Sara Schiller	\$30.00
Jeanne Shatten and Lawrence Oscar	\$50.00
Margaret and Bill Simon	\$45.00
Martha Sivertson	\$15.00
Annette and Mark Sutherland	\$30.00
Amy Switzer	\$15.00
Betty Ann Toth	\$15.00
Donna Whyte	\$15.00
Bertram Woods Branch Landscaping & Garden	
Jane Smith	\$25.00
Jean Sacatsh	\$25.00
Bertram Woods Branch New Books	
Mary Rebecca Bynum and J. Phillip Calabrese	\$50.00
Jean and David Foxman	\$500.00
Dick Shapiro	\$20.00
Bertram Woods Branch Fund (208-6510)	
In memory of Shirley Gendel	
Carole and Stan Berman	\$36.00
Deanna and David Katz	\$20.00
Joanne Klein	\$25.00
Kay Zuckerman and Jim McCarthy	\$10.00

Amy and Larrie Nadler	\$20.00
Rachel Nelson	\$10.00
Leona Polster	\$10.00
Ruth Sherman	\$25.00
Cathy and Robert Weiss	\$10.00
Jackie, Ron, Seth and Tova Wiesenthal	\$15.00
Dan, Laura, and Jeffrey Zuckerman	\$50.00
Isabelle Zuckerman	\$50.00
William Carpenter	\$100.00
Stephanie Danzinger	\$25.00
George DiSanto	\$40.00
Gretchen and Robert Larson	\$25.00
Ruth Mardell and Jerry Kagan	\$10.00
Ginger and Lamar Ratcliffe	\$40.00
Laura Rocker	\$25.00
Carolyn and Elliot Ross	\$25.00

Marilyn Kammer Memorial Fund (209-6510)

Randy Kammer	
In memory of Judge Virginia Beverly	\$25.00
In memory of Barbara Coleman	\$25.00
In memory of Carl Demery	\$25.00
In memory of Paul Dooley	\$25.00
In memory of Donald Goetz	\$25.00
In memory of Charles Gray	\$25.00
In memory of Gordon Kuhr	\$25.00
In honor of Deanne Roberts	\$25.00
In memory of Junior Seth Welch.	\$25.00
In memory of Mona "Lynn" Wolf	\$25.00
In memory of John Wooden	\$25.00
Roy Cohn and Susan Massari-Cohn	
In honor of Randy Kammer and Jeffry Wollitz	\$100.00

Frances Belman Fund (210-6110)

Marilyn Gardner	
In memory of Frances Belman	\$25.00

George Richardson

    Donated a Carl Krabill Painting, *I'm Winning*

2010-71      Mr. McGovern moved and Ms. Allen seconded the motion to accept and appropriate the above gifts.

Roll Call:      Ayes: Ms. Allen, Mr. McGovern, Mr. Miller, Dr. Whyte

                  Nays: None. Motion carried.

B. Personnel Actions (information only)

John Skvasik, Adult Services Associate, Level 109, end of employment effective July 1, 2010

William Neal, Maintenance Specialist, Level 107, end of employment effective July 31, 2010



Diane Nadeau, Circulation Services Assistant, Level 106, end of employment effective  
August 13, 2010

Announcements

None

Community Comments

Mr. Dickinson said the Friends Book Sale will be held from Thursday, October 7 to Sunday, October 10 at Main Library.

Mr. Dickinson said the “Genealogy for Teens” program will be held on September 21 at 7 p.m. at Main Library.

Adjournment

Dr. Whyte said that there being no further business, Mr. McGovern moved and Ms. Allen seconded the motion to adjourn the regular board meeting at 9:15 a.m. The next regular meeting of the Shaker Heights Public Library Board of Trustees will be Tuesday, October 12, 2010 at 6:30 p.m. in the Main Library Boardroom.

---

Dr. Whyte, President

---

David D. Piskac, Fiscal Officer

---

Kurt Miller, Secretary

# Shaker Heights Public Library

## Circulation of Library Material

---

### **I. Library Card Eligibility**

#### **A. Adult Cards**

1. Library cards are issued free of charge to anyone who resides, owns property, works, or attends school in Ohio. Adults age 18 and over must present a government-issued photo ID and proof of a current Ohio address.
2. Temporary residents must provide both permanent and temporary or school addresses. Out-of-state students attending an institution of higher learning in Ohio must provide their permanent and their college addresses, as well as a student ID.

#### **B. Juvenile Cards**

1. Juvenile cards are issued to minors under 18 and require the signature of a parent or legal guardian, who must be present at the time of application, provide a government-issued photo ID and proof of a current Ohio address, and assume responsibility for all activity (including payment of all fines and fees incurred) on the card. Non-parental custodians must show proof of guardianship.
2. If a parent or guardian wishes to restrict their child from borrowing movies, they may choose to do so as part of the library card application process.

### **II. Borrowing Privileges and Requirements**

1. Shaker Heights Public Library issues Greater Access library cards, which allow cardholders to borrow material from participating CLEVNET member libraries and the Cuyahoga County Public Library, subject to individual library policies.
2. To prevent loss of library material and to protect cardholders from fraudulent use of library cards, the library requires customers to present a library card or a valid form of government-issued photo ID for each transaction.
3. Cardholders are responsible for all material checked out on their cards, and if such material is returned late, damaged, or lost, are responsible for paying fines or replacement fees.
4. Cardholders are responsible for ensuring that their library records, and those of any minor children, include current contact information.
5. When presented with a valid library card for a transaction, library staff will generally not ask for additional identification.
6. If fines and fees total \$10 or more, the cardholder will not be allowed to borrow material.
7. Golden Buckeye cardholders and senior citizens with proof of age are exempt from fines for overdue material owned by Shaker Library, except for movies and 14-day books. Golden Buckeye cardholders are responsible for overdue fines for material owned by other libraries.

### **III. Lost, Stolen, or Damaged Cards**

1. Cardholders are responsible for reporting lost or stolen library cards immediately.

2. The owner of a lost or stolen library card is responsible for all material checked out on that card up to the time that he or she reported to the library that it was lost or stolen.
3. The cardholder may request a replacement for a lost or stolen card in person at the library.
4. Badly damaged or worn cards will be replaced, free of charge, upon request.

### **III. Thresholds / Loan Limitations**

1. 50 items\*
2. \$1,000 value\*

\* These policies work in tandem; if the \$1,000 threshold is met before the 50-item threshold, loans will not be allowed.

### **V. Renewals**

1. Cardholders may renew eligible items in person, by phone, or online via the CLEVNET catalog.
2. Online renewals require the library card number. Telephone renewals require a library card number or an item number.
3. Under no circumstances will library card numbers be released via telephone.

### **VI. Placing Holds or Requesting Materials from other Libraries**

#### **A. Placing Holds**

Customers may place holds on most materials found in the library catalog. The library belongs to the CLEVNET consortium and thereby shares a catalog and materials with more than 30 libraries. There is no charge for borrowing materials from other member libraries, and customers may initiate their own requests through the library catalog or website or ask for staff to help request materials from CLEVNET libraries.

#### **B. Interlibrary Loan**

Material may also be requested from libraries outside of CLEVNET via interlibrary loan. The library attempts to obtain material from other libraries for free whenever possible. However, some libraries charge a small fee for their material. Interlibrary loan fees over \$15 must be paid by the customer. Additionally, customers may be charged a small handling fee if they request interlibrary loan material but do not pick it up from the library once it has arrived.

### **VII. Returns**

Shaker Heights Public Library material may be returned to any Ohio library. Material that is returned to a CLEVNET member library will be discharged from the customer's library card upon receipt by that library. Material that is returned to non-CLEVNET libraries will be discharged from the customer's card when it is received by Shaker Heights Public Library.

### **VIII. Confidentiality of Library Records**

To comply with Ohio law and the Shaker Heights Public Library Confidentiality of Library Records Policy, the library does not release personal information, allow anyone to pick up items being held for another customer, reveal the amounts of another customer's fines, or disclose what another customer has borrowed from the library except in the following circumstances:

1. A person designated by a customer who presents that customer's card may receive information from that customer's record and/or complete transactions on that customer's behalf.
2. A parent or guardian who is listed in the "care/of" line of a minor's record may, upon presentation of a government-issued photo ID, receive information about the record and pay overdue fines. In order to borrow materials on a minor's card, the parent or guardian must provide the minor's library card or be accompanied by the minor and present government-issued photo ID.

**IX. Loan Periods, Renewals, and Holds\***

<b>Item</b>	<b>Loan Period</b>	<b>Renewals</b>	<b>Holds Allowed</b>
Newly released feature films	7 days	0	Yes
Other movies	7 days	2	Yes
TV Series	14 days	1	Yes
Magazines	7 days	2	No
Bestsellers	14 days	0	No
New books	14 days	5	Yes
All other material	21 days	5	Yes
<i>Eligible items may not be renewed if there are outstanding holds.</i>			

**X. Fines and Fees\***

<b>Item Type</b>	<b>Daily Fine / Fee</b>
Adult or teen book, magazine, or audio recording.	15¢ per day
Juvenile book, magazine, or audio recording	Fine-exempt
Movies	50¢ per day
Lost or damaged item	List replacement cost
Replacement of lost library card	\$1

The maximum overdue fine per item shall be \$5.00. Overdue fines shall not exceed the cost of the item.

\*These policies apply to material owned by Shaker Heights Public Library. The library lends material from other CLEVNET member libraries, and the policies of the owning library apply in those transactions.

**XI. Lost or Damaged Items**

1. An item more than 28 days overdue is considered lost, and the cardholder must pay to replace it.
2. If a lost item is found and returned the Library will refund the item cost, minus a 20% processing fee, if the following criteria are met:
  - a. The item is returned within 90 days after the lost item fee was paid.
  - b. The item is in good enough condition that the Library can still circulate it. "Good condition" is determined at the discretion of Library staff.
  - c. The customer brings the lost item receipt with the item when it is returned.
  - d. No refund will be paid in cash. Lost material and related fees paid by cash or check will be refunded by check and mailed to the customer.
3. Replacement charges are assessed for damaged items.

4. All cardholders must pay for lost or damaged material regardless of the fine exempt status of the item or the borrower.

**XII. Payment**

Shaker Heights Public Library accepts payment of overdue fines and replacement fees for all CLEVNET libraries by cash, check, or credit card.

**XIII. Collection Agency**

In order to protect its investment of public money in library material and services, the library works with a collection agency to retrieve long-overdue material or excessive unpaid fines.

1. A Shaker Heights Public Library or Cleveland Public Library customer account with total charges of \$50 or more that is 60 days past due will be sent to collection and a \$10.00 non-refundable service charge will be added to the account.
2. The collection agency will contact the customer by phone and letter over the following 120 days in hopes of resolving the problem. At the end of the 120-day period, the collection agency reports accounts that remain delinquent to three major credit agencies.

Please note that once an account has been referred to collection the library cannot issue a refund for lost material that is paid for and then found.

**XIV. Bankruptcy**

The Shaker Heights Public Library will comply with Discharge of Debtor decrees by bankruptcy courts. Once the library is notified that a bankruptcy has been filed, collection activity is suspended on the customer's account and on the accounts of any minor children (to the extent that the charges existed prior to the date of the bankruptcy filing) until the library is notified of the outcome.

1. Cardholders who have:
  - a. Filed for bankruptcy,
  - b. Named Shaker Heights Public Library as a creditor,
  - c. Received a discharge, and
  - d. Presented the appropriate documents to the library

shall have outstanding balances for fines, fees, and collection agency charges removed from their accounts. Only charges owed as of the date of the decree will be waived.

**XV. Authority**

The Director or designee has the authority to waive or modify any part of this policy at his/her discretion if warranted by extenuating circumstances.

*Approved by the Shaker Heights Public Library Board of Trustees, October 8, 2007; September 15, 2010*

# **Shaker Heights Public Library**

## **Reference and Information Services Policy**

---

### **I. Service Standards**

The library recognizes and respects that each question is important to the customer who asks it. Library staff will use authoritative and appropriate sources to respond to all customer questions. In some cases, staff may refer a customer to other agencies that can more completely answer a question.

Library service shall be based on the principle that assistance in locating appropriate material and information, and help in using library resources, shall be restricted only by the time and staff available. The number of customers waiting for help may restrict the time available to help any one customer; however, staff will strive to provide effective service to all customers.

Material that is not owned by the Shaker Heights Public Library shall be ordered from other CLEVNET member libraries to be held at or delivered to the library most convenient to the customer. Material not owned by the CLEVNET library consortium shall be made available to customers, when possible, through interlibrary loan from other library systems.

### **II. Service Limitations**

#### **A. Legal and Tax Information**

Staff provides legal definitions and specific citations from the codes, but does not interpret passages. Staff does not recommend specific attorneys, but may suggest the customer contact the local bar association for further assistance and may provide a list of attorney names from online search engines. Staff assists customers in locating specific tax forms and publications. Staff does not interpret tax regulations or provide tax advice.

#### **B. Medical Information**

Staff will assist customers in finding information about diseases, medical conditions, tests, and treatments in print and electronic resources. Staff does not interpret the information found in these medical resources. Staff does not make diagnoses, give advice, or recommend specific health care professionals.

#### **C. Research Requests**

If the information needed to answer a question is very lengthy or must be compiled from several sources, staff helps the customer to locate appropriate materials, show him or her how to use them, and checks periodically to make sure the customer is progressing well. When a research request is phoned in, staff encourages the customer to come to the library to use material that is only accessible in the library. Staff may recommend electronic resources and material to borrow from other libraries, and may make referrals to other libraries and organizations when those collections would better meet the customer's needs.

### **III. Local History Reference**

The Shaker Heights Public Library's Local History Collection is a repository of primary and secondary source material that furthers the knowledge of Shaker Heights and the adjacent Shaker Square area of Cleveland, past and present.

The Local History Collection is a non-circulating and non-browsing collection. Cataloged materials, such as the Shaker Authors Collection, high school yearbooks, and published works on Shaker Heights and Cleveland, can be retrieved by reference staff for in-library use during all regular library hours. Other local history materials including photos, maps, microfilm, and other paper documents can be accessed when the Local History Librarian is on duty or by prior arrangement with the Local History Librarian.

*Approved by the Shaker Heights Public Library Board of Trustees September 15, 2010*