



Agenda  
Bondurant Community Library - Library Board of Trustees  
104 2<sup>nd</sup> Street NE  
Bondurant, Iowa 50035  
Bondurant Community Library – Group Study B  
6 pm  
Wednesday, July 5, 2023

With Iowa cases of novel coronavirus, COVID-19, Library staff has been evaluating ways to meet State code requirements for hosting a public meeting while practicing social distancing measures recommended to curb the outbreak of COVID-19.0

\*Due to the COVID-19 concerns and social distancing recommendations, a virtual meeting is being offered. Participants wishing to speak on a topic should message the meeting moderator. All participants are asked to mute their individual computers at times when they are not speaking to minimize background noise.

To connect to the virtual meeting please use the following link

<https://us02web.zoom.us/j/83633904615?pwd=ZnR3NmhhRDl1S1VYNTU0OHUxYktRdz09>

To phone into the meeting please call the following number: 1 312 626 6799 US (Chicago)

Meeting ID: 836 3390 4615 Password: 732908

Roll Call

Call to order

- 1) Guests Present
- 2) Perfecting and Approving the Agenda
- 3) Approval of Consent Agenda
  - a) Approval of Minutes from past meeting –June 2023
  - b) Financial Report
  - c) Approval of Warrant List/Authorize expenditures
  - d) Staff Report -- June
  - e) Director Report --June
  - f) Statistics
- 4) Public Comments
- 5) Foundation Update
- 6) Friends of the Library Update
- 7) City Council Liaison Report
- 8) Old Business
- 9) New Business
  - a) Trustee Training – Chapter 5 Trustee Handbook
  - b) Discussion/Decision Polk County Contract for rural library service
  - c) Discussion/Decision Patron Behavior Policy

10)Board President Items –

11)Adjournment

Next meeting August 2, 2023

Any person with a disability who requires a modification or accommodation in order to participate in the meeting, or any person with limited English proficiency (LEP) who requires language assistance

to communicate with the Library Board of Trustees during the meeting, should contact the Library Director, (515) 967-4790 or [jills@bondurant.lib.ia.us](mailto:jills@bondurant.lib.ia.us), no fewer than two business days prior to the meeting to enable the Bondurant Community Library to make reasonable arrangements to assure accessibility or language assistance for the meeting.

**Meeting Minutes**  
**Bondurant Community Library | Library Board of Trustees**  
**Wednesday, June 7, 2023**

1. **Roll Call:** *Members Present:* Josh Bryant, Jen Keeler, Sue Ugulini, Julie Bergeson, Mike Kramer, Amber Flinn and Craig Campbell. Library Director Sanders and assistant Director Klinker-Feld were also present.
2. **Call to order:** Meeting called to order at 6:07 PM by President Bryant.
3. **Guests present:** Marketa Oliver, City of Bondurant; Matt Sillanpaa, City Council liaison (attended virtually).
4. **Perfecting and Approving the Agenda:** Motion to approve the agenda by Ugulini, seconded by Campbell. Motion carried.
5. **Approval of Consent Agenda:**
  - a. Minutes of past meeting – May 2023
  - b. Financial Report
  - c. Approve Warrant list / authorize expenditures
  - d. Staff Report - May
  - e. Director's Report - May
  - f. Statistics Review

Motion to approve the above consent agenda with correction by Keeler, seconded by Kramer. Motion carried.

6. **Public Comments:** None.
7. **Library Foundation Update:** Book Sale was held May 12-13, 2023.
8. **Friends of the Library Update:** Continue to recruit volunteers for various activities and fundraising.
9. **City Council Liaison Report:** Bondurant Men's Club annual SummerFest is June 12-13. The City has hired a team of consultants to create an Art, Culture & Wayfinding Plan and is seeking community input.
10. **Old Business: None.**
10. **New Business:**
  - a. **Trustee Training – Chapter 4 Trustee Handbook.** Reviewed Chapter 2: *Hiring a Library Director*. Trustees reminded to report completed education to Director Sanders.
  - b. **Polk County contract for rural library service.** Director Sanders provided an update on changes to funding for rural library services. Discussions continue with other Polk County Libraries and the Board of Supervisors.

**B. Board President Items:** None.

**12. Adjournment:** Motion to adjourn by Campbell, seconded by Kramer. Motion carried.

**Next Meeting:** Wednesday, July 5, 2023 at 6PM



# Budget Report Account Summary

For Fiscal: 2022-2023 Period Ending: 06/30/2023

	Original Total Budget	Current Total Budget	Period Activity	Fiscal Activity	Variance Favorable (Unfavorable)	Percent Remaining
<b>Fund: 001 - GENERAL FUND</b>						
<b>Department: 410 - LIBRARY</b>						
<a href="#">001-410-1-4500</a> FINES & FEES	3,700.00	3,700.00	329.49	4,429.81	729.81	119.72 %
<a href="#">001-410-2-4465</a> CO CONTRIB LIBRARY-POLK CO AUD	32,967.00	32,967.00	0.00	43,956.00	10,989.00	133.33 %
<a href="#">001-410-2-4710</a> REIMBURSEMENT-LIBRARY GRANTS	0.00	0.00	1.20	5,010.70	5,010.70	0.00 %
<a href="#">001-410-4-4710</a> REIMBURSEMENTS	352.00	352.00	0.00	0.00	-352.00	100.00 %
<a href="#">001-410-6010</a> SALARIES	306,092.80	306,092.80	24,245.96	304,032.62	2,060.18	0.67 %
<a href="#">001-410-6020</a> SALARIES-PART-TIME	53,487.20	53,487.20	5,913.90	62,010.47	-8,523.27	-15.94 %
<a href="#">001-410-6210</a> ASSOCIATION DUES	1,500.00	1,500.00	0.00	1,024.00	476.00	31.73 %
<a href="#">001-410-6230</a> TRAINING	600.00	600.00	0.55	244.42	355.58	59.26 %
<a href="#">001-410-6240</a> MEETINGS & CONFERENCES	3,500.00	3,500.00	0.00	3,565.61	-65.61	-1.87 %
<a href="#">001-410-6310</a> BUILDING & GROUND MAINTENAN...	15,000.00	15,000.00	1,601.86	8,186.21	6,813.79	45.43 %
<a href="#">001-410-6340</a> OFFICE EQUIPMENT REPAIR	200.00	200.00	0.00	0.00	200.00	100.00 %
<a href="#">001-410-6350</a> OPERATIONAL EQUIPMENT REPAIR	1,000.00	1,000.00	0.00	0.00	1,000.00	100.00 %
<a href="#">001-410-6371</a> ELECTRIC / GAS	24,000.00	24,000.00	2,623.00	25,326.00	-1,326.00	-5.53 %
<a href="#">001-410-6373</a> TELECOMMUNICATION EXPENSE	37,000.00	37,000.00	728.71	38,420.19	-1,420.19	-3.84 %
<a href="#">001-410-6411</a> LEGAL EXPENSE	1,500.00	1,500.00	0.00	1,813.68	-313.68	-20.91 %
<a href="#">001-410-6419</a> COMPUTER SUPPORT	8,000.00	8,000.00	2,091.52	7,483.19	516.81	6.46 %
<a href="#">001-410-6499</a> CONTRACT SERVICES	32,500.00	32,500.00	2,856.47	28,984.18	3,515.82	10.82 %
<a href="#">001-410-6502</a> PRINTED MATERIALS	44,000.00	44,000.00	1,356.72	41,941.37	2,058.63	4.68 %
<a href="#">001-410-6503</a> DIGITAL MATERIALS	20,000.00	20,000.00	1,226.71	19,763.39	236.61	1.18 %
<a href="#">001-410-6504</a> MINOR EQUIPMENT	2,000.00	2,000.00	0.00	2,400.36	-400.36	-20.02 %
<a href="#">001-410-6506</a> OFFICE SUPPLIES	6,000.00	6,000.00	191.84	4,324.15	1,675.85	27.93 %
<a href="#">001-410-6507</a> OPERATING SUPPLIES	1,000.00	1,000.00	0.00	1,990.63	-990.63	-99.06 %
<a href="#">001-410-6508</a> POSTAGE-SHIPPING	1,000.00	1,000.00	74.93	1,393.80	-393.80	-39.38 %
<a href="#">001-410-6580</a> MISCELLANEOUS	1,000.00	1,000.00	0.00	427.69	572.31	57.23 %
<a href="#">001-410-6599</a> LIBRARY PROGRAMS	8,000.00	8,000.00	820.70	8,045.20	-45.20	-0.57 %
<a href="#">001-410-6725</a> TECHNOLOGY REPLACEMENT	9,000.00	9,000.00	0.00	12,428.56	-3,428.56	-38.10 %
<b>Department: 410 - LIBRARY Surplus (Deficit):</b>	<b>-539,361.00</b>	<b>-539,361.00</b>	<b>-43,402.18</b>	<b>-520,409.21</b>	<b>18,951.79</b>	<b>3.51%</b>
<b>Fund: 001 - GENERAL FUND Surplus (Deficit):</b>	<b>-539,361.00</b>	<b>-539,361.00</b>	<b>-43,402.18</b>	<b>-520,409.21</b>	<b>18,951.79</b>	<b>3.51%</b>

**Budget Report**

For Fiscal: 2022-2023 Period Ending: 06/30/2023

	Original Total Budget	Current Total Budget	Period Activity	Fiscal Activity	Variance Favorable (Unfavorable)	Percent Remaining
<b>Fund: 167 - LIBRARY GRANT</b>						
<b>Department: 410 - LIBRARY</b>						
<a href="#">167-410-2-4440</a> LIBRARY STATE AID	5,954.00	5,954.00	0.00	5,953.71	-0.29	0.00 %
<a href="#">167-410-2-4705</a> T/A-LIBRARY DONATIONS	19,129.00	19,129.00	4,858.52	31,536.04	12,407.04	164.86 %
<a href="#">167-410-4-4300</a> INTEREST - LIBRARY T&A	112.00	112.00	0.00	219.29	107.29	195.79 %
<a href="#">167-410-6506</a> TRUST & AGENCY LIBRARY EXPENSE	10,000.00	10,000.00	9,251.58	30,777.08	-20,777.08	-207.77 %
<b>Department: 410 - LIBRARY Surplus (Deficit):</b>	<b>15,195.00</b>	<b>15,195.00</b>	<b>-4,393.06</b>	<b>6,931.96</b>	<b>-8,263.04</b>	<b>54.38%</b>
<b>Fund: 167 - LIBRARY GRANT Surplus (Deficit):</b>	<b>15,195.00</b>	<b>15,195.00</b>	<b>-4,393.06</b>	<b>6,931.96</b>	<b>-8,263.04</b>	<b>54.38%</b>

**Budget Report**

**For Fiscal: 2022-2023 Period Ending: 06/30/2023**

	<b>Original Total Budget</b>	<b>Current Total Budget</b>	<b>Period Activity</b>	<b>Fiscal Activity</b>	<b>Variance Favorable (Unfavorable)</b>	<b>Percent Remaining</b>
<b>Fund: 351 - LIBRARY CAPITAL</b>						
<b>Department: 410 - LIBRARY</b>						
<a href="#">351-410-6799</a>						
OTHER CAPITAL OUTLAY	8,040.00	8,040.00	0.00	8,039.70	0.30	0.00 %
<b>Department: 410 - LIBRARY Total:</b>	<b>8,040.00</b>	<b>8,040.00</b>	<b>0.00</b>	<b>8,039.70</b>	<b>0.30</b>	<b>0.00%</b>
<b>Fund: 351 - LIBRARY CAPITAL Total:</b>	<b>8,040.00</b>	<b>8,040.00</b>	<b>0.00</b>	<b>8,039.70</b>	<b>0.30</b>	<b>0.00%</b>
<b>Report Surplus (Deficit):</b>	<b>-601,463.00</b>	<b>-601,463.00</b>	<b>-47,795.24</b>	<b>-578,469.43</b>	<b>22,993.57</b>	<b>3.82%</b>

Budget Report

For Fiscal: 2022-2023 Period Ending: 06/30/2023

Group Summary

Departmen...	Original Total Budget	Current Total Budget	Period Activity	Fiscal Activity	Variance Favorable (Unfavorable)	Percent Remaining
Fund: 001 - GENERAL FUND						
410 - LIBRARY	-539,361.00	-539,361.00	-43,402.18	-520,409.21	18,951.79	3.51%
Fund: 001 - GENERAL FUND Surplus (Deficit):	-539,361.00	-539,361.00	-43,402.18	-520,409.21	18,951.79	3.51%



**Budget Report**

**For Fiscal: 2022-2023 Period Ending: 06/30/2023**

Departmen...	Original Total Budget	Current Total Budget	Period Activity	Fiscal Activity	Variance Favorable (Unfavorable)	Percent Remaining
<b>Fund: 167 - LIBRARY GRANT</b>						
410 - LIBRARY	15,195.00	15,195.00	-4,393.06	6,931.96	-8,263.04	54.38%
<b>Fund: 167 - LIBRARY GRANT Surplus (Deficit):</b>	<b>15,195.00</b>	<b>15,195.00</b>	<b>-4,393.06</b>	<b>6,931.96</b>	<b>-8,263.04</b>	<b>54.38%</b>

**Budget Report**

**For Fiscal: 2022-2023 Period Ending: 06/30/2023**

Departmen...	Original Total Budget	Current Total Budget	Period Activity	Fiscal Activity	Variance Favorable (Unfavorable)	Percent Remaining
Fund: 351 - LIBRARY CAPITAL						
410 - LIBRARY						
<b>Fund: 351 - LIBRARY CAPITAL Total:</b>	<b>8,040.00</b>	<b>8,040.00</b>	<b>0.00</b>	<b>8,039.70</b>	<b>0.30</b>	<b>0.00%</b>
<b>Report Surplus (Deficit):</b>	<b>-601,463.00</b>	<b>-601,463.00</b>	<b>-47,795.24</b>	<b>-578,469.43</b>	<b>22,993.57</b>	<b>3.82%</b>

**Fund Summary**

Fund	Original Total Budget	Current Total Budget	Period Activity	Fiscal Activity	Variance Favorable (Unfavorable)
001 - GENERAL FUND	-539,361.00	-539,361.00	-43,402.18	-520,409.21	18,951.79
167 - LIBRARY GRANT	15,195.00	15,195.00	-4,393.06	6,931.96	-8,263.04
172 - TREE FUND	-69,257.00	-69,257.00	0.00	-56,952.48	12,304.52
351 - LIBRARY CAPITAL	-8,040.00	-8,040.00	0.00	-8,039.70	0.30
<b>Report Surplus (Deficit):</b>	<b>-601,463.00</b>	<b>-601,463.00</b>	<b>-47,795.24</b>	<b>-578,469.43</b>	<b>22,993.57</b>

**Bondurant Community Library**  
**Library Board of Trustees**  
**July 5, 2023**  
**Warrant List**

Company	Description	Budget Code	Invoice	Amount
Association for Rural & Small Libraries	Conference Registration - Michell (pre-conference) Michell won a registration for this year.	001-410-6240	68894	\$125.00
Baker & Taylor	Books	001-410-6502	2037528554	\$1,460.47
	Books SRP	167-410-6505	2037528554	\$15.97
	Books	001-410-6502	2037498611	\$25.52
	Credit	001-410-6502	3281536	-\$7.79
	Credit	001-410-6502	3281537	-\$36.47
	Books	001-410-6502	2037523178	\$49.37
	Books	001-410-6502	2037533044	\$41.26
	Books	001-410-6502	2037556086	\$195.46
Central Iowa Mechanical	HVAC temp issues	001-410-6310	21341	\$117.00
Central Iowa Mechanical	HVAC temp issues	001-410-6310	20759	\$1,528.00
City Hall Credit Card	Water and plates break out for Benefits Bash held 5/5/2023	001-410-6230	statement	\$0.55
Hoopla	digital content 4/30/2023	001-410-6503	503722135	
Konica Minolta	Copier	001-410-6499	5025400953	\$239.76
Konica Minolta	phone	001-410-6373	220011350	\$526.98
Menards	Baby changing station replacement damaged parts for reinstall	001-410-6504	receipt	\$30.99
MicroMarketing	Large Print	001-410-6502	921922	\$23.99
MidAmerican	utilities	001-410-6371	540212843	\$1,995.00
Midwest Alarm Services	Fire Alarm Monitoring	001-410-6499	419595	\$539.88
Overdrive	digital materials	001-410-6503	06497co23189917	\$1,986.95
Petty cash	Postage	001-410-6508	receipt	\$140.97
Playaway Products	Wonder Book	001-410-6502	433271	\$1,022.03
Playaway Products	Wonder book	001-410-6502	432124	\$52.69
Playaway Products	Wonder Book	001-410-6502	429146	\$52.69
Playaway Products	Wonder Book	001-410-6502	428362	\$52.69
Provantage	front desk computer replacement	001-410-6725	9229628	\$790.00
Sanders, Jill	3 toaster ovens for programming	001-410-6599	receipt	\$82.25
Stratus	cleaning services -	001-410-6499	6124224	\$851.56
The Book Farm	children's books	001-410-6502	REB13715-1	\$109.40
Unique	collection service	001-410-6499	6113487	\$34.95
US Cellular	hotspot data	001-410-6373	587395924	\$356.90

**Bondurant Community Library**  
**Library Board of Trustees**  
**July 5, 2023**  
**Warrant List**

Verizon	hotspot data	001-410-6373	Statement	<b>\$2,334.64</b>
Visa	labels	001-410-6506	Statement	<b>\$16.56</b>
	credit for returned labels	001-410-6506	statement	<b>-\$16.56</b>
	programming supplies	001-410-6599	Statement	<b>\$60.94</b>
	books/movies	001-410-6502	statement	<b>\$474.52</b>
	Mulch	001-410-6310	Statement	<b>\$160.44</b>
	Baby changing station replacement damaged	001-410-6504	Statement	<b>\$482.72</b>
	bathroom supplies	001-410-6507	Statement	<b>\$136.77</b>
	computer disposal at Metro Waste Authority	001-410-6419	Statement	<b>\$95.74</b>
	Summer Reading Program supplies	167-410-6506	Statement	<b>\$247.69</b>
	Walsh	door repair	001-410-6310	796459
Walsh	door repair	001-410-6310	797009	<b>\$219.75</b>
Wright Outdoor Solutions	Bug treatment for Ash Tree	001-410-6310	53002	<b>\$450.00</b>
<b>Total Operating Expenses</b>				<b>\$16,998.57</b>
<b>Trust and Agency Expenses</b>				<b>\$263.66</b>
<b>Total</b>				<b>\$17,262.23</b>

\_\_\_\_\_  
 Bondurant Community Library Board President  
 SIGNATURE

\_\_\_\_\_  
 Date

\_\_\_\_\_  
 Bondurant Community Library Board Secretary  
 SIGNATURE

\_\_\_\_\_  
 Date

## STAFF REPORT JUNE 2023



Michell:

- Attended Bondurant Historical Society meeting on June 19
- Webinar “Introduction to WhoFi’s Questions Sets”
- Webinar “Foundations of Public Libraries: Principles of a Noble Profession” (Endorsement course)

Megan S.:

Megan M.:

Chantel:

- Webinar “Intro to Public Services” endorsement course
- Discussion for “Intro to Public Services”
- Virtual All Iowa Reads author talk
- Webinar “Foundations of Public Libraries” endorsement course
- Webinar “HF 718 (Iowa Property Tax Reform)” and Q&A following

Emma:

Christina:

Events in May:

- 13 Story Times at the Library
- 4 Story Times at City Park
- 5 Sessions of Baby Story & Play
- 9 Sessions of Fit for Life!
- Adult Craft Night
- Book discussion for Adults
- Third Thursday at Hoover’s
- Books on Tap book discussion at Reclaimed Rails
- Book Club for grades 3-5
- Book Club for grades 6-8
- Book Club for grades 9-12
- Teen Advisory Group
- Pokémon Club
- 8 Summer Reading Programs
- 2 Booths at the Farmers Market



## Librarian items June 2023

- Director Sanders attended City Council on June 5 and 19.
- No Library staff meeting was held in June.
- Director Sanders attended Foundation and Friends meetings on June 21.
- Director Sanders attended Polk County Library meeting virtually on June 14. Discussion was held on the Polk County Contract that was just received from the Supervisors Office. This contract is due to expire on July 1, 2023.
- The Library's Summer Reading Program began on June 5. Outreach to daycare facilities, weekly programs, prize incentives and much more will continue until the end of July. 660 have registered on-line for the program as of June 14.
- Final landscaping tree replacements from the building project have been completed 6 trees, 6 shrubs were replaced that had not survived this past year. City Works Department is assisting with the watering of these new trees/shrubs.



Drum Safari Summer Reading Program

Elvis the Pony Summer Reading Program





## Chapter 5: Approving and Monitoring the Budget

### Budgetary Powers of Library Boards

Library boards typically have a great deal of authority over the library budget. Most city-library ordinances authorize control of the library budget to the board of trustees including the authority to approve expenditures and to move funds between line items. Always refer to your own city-library ordinance to reference the board's level of authority in the budgeting process. (See **Sample City-Library Ordinance** in the **Appendix**.)

It is essential for library trustees to come to understand:

- ❖ Their budgetary powers
- ❖ The annual budget development and approval process
- ❖ Funding sources
- ❖ The level of funding needed for library operations

The library director is a partner with the library board on financial matters and is responsible for communicating operational needs and drafting a proposed budget to the board.

### City and County Funding

Both city and county support of public libraries is mandated by **Iowa Code 256.69**, which states: *"...Each city within its corporate boundaries and each county within the unincorporated area of the county shall levy a tax of at least six and three-fourths cents per thousand dollars of assessed value on the taxable property...for the purpose of providing financial support to the public library which provides library services within the respective jurisdictions."*

In other words, a tax of at least \$.0675 per \$1,000 assessed property valuation must be



levied by each county and city to provide financial support to the public library which provides them with library service. The tax of at least \$0.0675 per \$1,000 of assessed property required by the Code is an outdated and inadequate minimum. No public library in Iowa could keep its doors open if it were funded at this level. Most cities fund their libraries far above the minimum required by the Code.

In Iowa, there is a cap on the amount a city may levy for the General Fund of \$8.10 per \$1,000 of assessed property valuation. Approximately 85% of Iowa cities are at this limit and therefore, additional revenue comes only from increased valuation of property or from special levies such as the special library levy described later in this chapter.

Public libraries are also funded from the county's rural services fund which includes road clearing, weed eradication and sanitary disposal. The maximum levy for rural services is \$3.95 per \$1,000 of assessed value in the unincorporated areas.

Your library may also receive funding from nearby cities that do not have their own municipal library. To meet the requirements of **Iowa Code 256.69**, such cities are required to contract with an established library to obtain service for their residents.

Public libraries are a department of city government. In the majority of Iowa libraries, the primary source of funding is tax dollars. Therefore, boards must be accountable for the receipt and spending of funding in accordance with the Code of Iowa. Refer to the following Code chapters related to budget and finance for city governments:

**Iowa Code 384.3 GENERAL FUND:**

*All moneys received for city government purposes from taxes and other sources must be credited to the general fund of the city, except that moneys received for the purposes of the debt service fund, the trust and agency funds, the capital improvements reserve fund, the emergency fund and other funds established by state law must be deposited as otherwise required or authorized by state law. All monies received by a city from the federal government must be reported to the department of management who shall transmit a copy to the legislative services agency.*

**Iowa Code 384.20 SEPARATE ACCOUNTS:**

- 1. A city shall keep separate accounts corresponding to the programs and items in its adopted or amended budget...*
- 2. A city shall keep accounts which show an accurate and detailed statement of all public funds collected, received, or expended for any city purpose, by any city officer, employee, or other person, and which show the receipt, use, and disposition of all city property. Public monies may not be expended or encumbered except under an annual or continuing appropriation.*

## Budget Management and Oversight

Overseeing the library's budget is one of the most difficult items you will have to monitor and evaluate, but it doesn't have to be an overwhelming task. Begin your monitoring with careful attention to the budget, which is the annual financial plan for the library. The budget will be prepared by the director and staff and presented to the board for approval. When the budget is presented, ask whatever questions you find necessary to gain a reasonable understanding of this financial plan—basically, where the money is coming from and how it will be spent.

New board members should receive a thorough orientation about library finances. **Ask questions if the budget, financial reports, or audit reports are not clear to you.**

Throughout the budget process, boards and directors must have these three things well in hand. They must have the money to spend, have the authority to spend it, and be accountable for the spending.

Boards and directors need to anticipate how much money they expect to receive from all revenue sources. Even gift money and memorials have to be estimated and budgeted before the money can be spent. This all has to happen within the framework of the city's budget process. Revenue from all sources should be reflected in the library's budget documents before the board proceeds with spending.

The budget process serves three basic purposes:

- ❖ **Accountability:** As a stewardship role, trustees have a fiduciary responsibility to use public funds wisely and in compliance with applicable laws, regulations, contracts, etc. This includes spending the funds needed to provide library services to the community, planning for future needs such as equipment replacement but not hoarding funds or “saving for a rainy day.”
- ❖ **Decision-making:** Trustees need accurate, timely, and reliable information to make effective decisions.
- ❖ **Openness:** The public has a right to be informed about the financial conditions and operations of the library.

## Budget Calendar

In Iowa, the fiscal year begins on July 1 and ends on June 30.

**October to November:** Library directors draft the budget proposal and the board discusses, approves, and adopts the budget request before it is sent to city council. Items to consider when setting the budget request include:

- ❖ Reviewing the library's strategic plan
- ❖ Reviewing current spending
- ❖ Projecting anticipated expenditures
- ❖ Deciding library priorities based on the plan
- ❖ Projecting anticipated revenues

Part of the anticipated revenue includes the amount of county funding the library expects to receive from the County Supervisors.

**December to January:** Directors and boards present the budget request to city councils and county supervisors. The city sets the date and time of the budget hearings, as well as the criteria for what the presentation will include. Although library budget requests are subject to many of the same guidelines as other city departments, the city has authority to approve only the bottom line amount. Trustees have line item control and determine staff salaries and other individual parts of the budget.

**January to March:** City councils and county supervisors hold budget work sessions and adopt the final budgets. Hearings for adoption are held and the budget goes to the county auditor in March for certification.

**July 1:** The certified budget takes effect.

### **Budget Process**

Since library funds may not be spent except by motion of the board, the trustees need financial reports (including bills) in advance in order to be prepared to question them and vote on them at board meetings. Invoices and bills approved by the board and signed by the designated board authorities (usually the board president and secretary) are then sent to the city clerk for payment. A copy of the monthly financial report may be included with the invoices for informational purposes.

The Iowa Department of Management, the State Auditor's Office, and the Iowa League of Cities all strongly recommend that the city does the financial accounting, writes checks for the library's expenditures after authorization by the board, and submits monthly financial reports to the board. The State Library of Iowa upholds this position.

### **Monitoring the Budget**

While the board should delegate the power to purchase materials, supplies and other goods to the director, it should be aware of all purchases and monitor the budget monthly throughout the year. Directors should provide trustees with monthly financial reports which review:

- ❖ Current listing of bills being paid
- ❖ Month-to-date/year-to-date spending
- ❖ Budget balance remaining
- ❖ Explanation of major changes

If there are variations you don't understand, ask the library director to explain them. Depending on the information you receive, the board may need to adjust and/or amend the budget. The majority of Iowa library ordinances allow the library board the authority to shift funds from one line item to another as needed. The library may need to request an amendment to the city's certified budget as discussed below.

The library and city finance officer should monitor the library appropriation to ensure sufficient funds are available prior to board approval of library expenditures and to ensure timely amendment to the certified budget, if necessary.

### **Amending the Certified Budget**

The library may spend only the amount budgeted within one fiscal year. If the library receives additional income from any source (grants, donations, etc.) that additional income cannot be spent unless the certified budget is amended to include it. No city department, including the library, should spend more than has been budgeted for its department unless the certified budget is formally amended by the city council.

Most cities routinely amend their certified budgets; library amendments, if any, should be included. Amendments must be approved and published by city officials before May 31 of the current fiscal year, the statutory deadline for city budget amendments.

The city clerk or city budget manager should be consulted to determine the date when the library's amendments must be submitted for inclusion in the city's amendment hearing. A legal form for requesting an amendment will be provided by the city.

### **Permanent Accounts and Special Revenue Funds**

One of the biggest mistakes that library boards can make is to not have plans for unexpected funding. It is not unheard of for Iowa libraries to have funds diverted from the library to the city's General Fund because there were no plans for the funds and no encumbrances or trust accounts established.

**Iowa Code 384.3** states that *"all money received for city governmental purposes from taxes and other sources must be credited to the general fund of the city, except those monies received for the purposes of...trust and agency funds."*

Funds remaining in the library account at the end of the fiscal year will revert to the

general fund unless the city has given authority to the library board to carry over the funds in the library account or unless the funds are designated to a specific account. There are two types of accounts:

- ❖ Permanent accounts, where the library can only spend the interest generated.
- ❖ Special revenue funds, that allow the library to spend the entire amount in the account.

The basis for this change is Government Accounting Standards Board (GASB) Statement #34 from June 1999 that took effect in either 2001 or 2002, depending upon the city's level of revenue.

These account(s) may be established for funds being saved for a particular project. If there is no purpose for the account other than accumulating money, the account(s) may not be allowed. The board, working with the director, should plan for unexpected funds: Is there a need for an addition or new building for the library? Is new shelving needed? Are more computers needed? Does the library intend to automate or purchase a different automation system?

The money in these accounts:

- ❖ Will carry over from year to year until the purpose for which it was established is accomplished.
- ❖ Is not to be used for day-to-day operation of the library unless the trust provides, such as an endowment trust.
- ❖ Will not revert to the city General Fund.
- ❖ Will be expended only by a motion of the library board and only for the purpose specified in the trust, such as the "library building project."

If the library has plans for year-end funds, the board should request that the city council pass a resolution to authorize carryover of the fund balance or establish either of the above accounts. The resolution should indicate, among other things, the title of the account(s), the purpose of the account(s), and whether the interest on the fund is to be added to the account(s). The city council then passes a resolution establishing these account(s) to accumulate funds for a planned purpose or project.

**A word of caution:** Gifts and donations given to a public library must be retained and accounted for by the public library. These gifts and donations become "public funds" upon receipt by the public library and may not be simply turned over or given to another private organization such as a library foundation.

## Investments

There are several local and state restrictions on spending public money and even more restrictions on investing it. According to state law, your city must have a written investment policy in place and a designated finance officer whose responsibility it is to invest public funds according to the investment policy. Library trustees are not the city's designated finance officers, so the board cannot invest any of the library's money, even if the trustees have accepted a generous bequest.

## Petty Cash

Generally speaking, petty cash is established for the payment of relatively small purchases as postage, deliveries, or urgently needed supplies. When payment by check is not always possible or practical, a petty cash fund is established on an imprest basis to handle these small purchases. The Governmental Accounting, Auditing and Financial Reporting (GAAFR) definition of "imprest account" states in part that this is *"an account into which a fixed amount of money is placed for minor disbursements..."*

As a public agency, the library's internal control over the petty cash fund is important and should be conducted openly. The petty cash should be placed in the custody of a specific employee who is authorized to disburse the fund in accordance with stipulated restrictions as to maximum amount and purpose. The following recommendations should be considered regarding petty cash funds:

- ❖ The petty cash fund should be established by Board action. The board should approve a policy to authorize the maximum amount of the petty cash fund, the types of allowable disbursements, the method and frequency of replenishment and the authorized custodian.
- ❖ On a periodic/monthly basis, the petty cash fund should be balanced and replenished by check to the original established amount.
- ❖ All cash received or collected by the library should be recorded as a receipt and deposited in the bank. It is not acceptable to replenish petty cash with miscellaneous library receipts such as fines or copy fees.
- ❖ Petty cash funds should not be used to cash personal checks.
- ❖ Payment receipts should support petty cash payments. For example, these could include postage receipts, cash register receipts or other documentation to explain the petty cash item that was purchased or paid for.

## Gifts and Memorials

Boards and directors need to anticipate how much money they expect to receive from all funding sources. Even gift money and memorials have to be estimated and budgeted before the money can be spent. This all has to happen within the framework of the city's budget process.

## **Encumbrances**

An encumbrance is a purchase order or contract entered into by the library before the end of the fiscal year for goods and services not yet received. For example, new laptop computers ordered for the library in June, but not delivered until after July 1, would be an encumbered obligation. The funds set aside in the budget for the laptops would carry over to the next fiscal year because the obligation for the order was encumbered (or made) before the end of the fiscal year.

## **Audits**

*According to the Iowa Auditor of State (August 2020): "Cities under 2,000 population with \$1 million or more in budgeted expenditures in two consecutive years will be required to have an annual examination. Cities with budgeted expenditures of \$1 million or more in a single year will continue to be subject to a periodic examination, not an annual examination. Cities under 2,000 population with less than \$1 million of budgeted expenditures will be subject to a periodic examination to be performed at least once every eight years."*

As part of the city's audit, the library may be asked to provide its financial records. In cooperation with its city government, some library boards have requested an audit be done simply as a safeguard of the library's finances. Also, a city audit may be required if federal funds in excess of \$300,000 have been disbursed or expended during the fiscal year. Be aware that sometimes the financial statements of a Friends Group or a Foundation also become part of the library's audit process.

## Roles and Responsibilities of the Director, Board, and City

Library Director	Library Board	City Council and Mayor	City Clerk or Administrator
<p>Keeps the library board informed of library activities, needs and concerns.</p> <p>Prepares a draft budget request.</p> <p>Explains monthly library expenditures to the board.</p> <p>Provides library board with monthly financial reports.</p> <p>Informs city council, mayor, city staff about library activities, needs and concerns.</p>	<p>Stays informed about library activities, needs and concerns.</p> <p>Reviews draft budget request including line items.</p> <p>Approves final budget request based on board approved priorities.</p> <p>Supports and advocates for budget request when presented to the city.</p> <p>Approves monthly expenditures; ultimately and legally responsible for how funds are spent.</p> <p>Reviews monthly financial reports; prioritizes needs to match available funding (has authority to shift funds from one line item to another as needed).</p> <p>Informs city council, mayor, city staff about library activities needs and concerns.</p>	<p>Mayor appoints library board members with approval of city council.</p> <p>Appropriates bottom line funding for the library.</p>	<p>Pays expenditures approved by the library board.</p> <p>Provides the library with monthly reports showing paid expenditures and status of budget.</p> <p>Stays informed about library activities, needs and concerns.</p>

### Additional Sources of Funding

In addition to city and county funding (the primary source of funding for the majority of Iowa public libraries), boards should be aware of the following possible additional sources of funding.

#### Special Library Levy

The special library levy (also known as the 27-cent levy) is a potential source of additional funding for public libraries allowed by **Iowa Code 384.12 (2)**. It allows cities to levy an additional tax of up to \$0.27 per \$1,000 assessed property valuation in order to provide better library service. A petition and referendum is required to pass the levy. The levy must be passed by a simple majority in order to be enacted. The levy question is put on the ballot in regular city elections, held in odd numbered years.



## State Funds

Public libraries receive state funding through the **Enrich Iowa Program**, which includes **Direct State Aid, Open Access** and **Interlibrary Loan Reimbursement**. The funding for Enrich Iowa is appropriated by the Iowa Legislature and approved by the Governor before being distributed to participating libraries by the State Library.

- ❖ **Direct State Aid** is distributed to public libraries based on meeting the standards prescribed in the **Public Library Standards**.
- ❖ **Open Access** is a reciprocal borrowing program which enables library customers from a participating library to check out materials, in person, free of charge. Libraries participating in Open Access are subsidized for each item loaned to a nonresident user. Open Access funding supplements, not replaces, local funding.
- ❖ **Interlibrary Loan Reimbursement** is a program intended to provide Iowans equal access to library resources by encouraging and supporting resource sharing among different types of libraries. The program pays a subsidy for each item loaned to eligible Iowa libraries. Interlibrary Loan Reimbursement funding supplements, not replaces, local funding.

## Federal Funds

Through the Grants to States program, the **Institute of Museum and Library Services (IMLS)** provides federal **Library Services and Technology Act (LSTA)** funds to state libraries, including the State Library of Iowa, using a population-based formula. In Iowa, LSTA funds are used primarily to support statewide programs and services such as the annual summer library program, staff and board education, statewide access to online resources, interlibrary loan network through **State of Iowa Libraries Online (SILO)**; the **Iowa Center for the Book**; **Public Library Standards** and more.

## Library-Specific Foundations

A library foundation is established to become a vehicle for gifts, bequests, memorials, fund-raisers, capital campaigns, etc. for that specific library only. Such a library foundation functions as a separate entity and can attain 501(c)(3) status from the Internal Revenue Service. Gifts to this foundation are tax deductible to the donor. One factor which makes setting up a foundation extremely attractive is that many donors, such as corporate foundations, will give only to organizations that have 501(c)(3) status.

Of course, the library board may also accept monetary gifts and bequests without establishing a foundation. In order to earmark the funds and demonstrate compliance with the terms of the gift, the board will need to ask the city to establish a library trust account. See "Trust Accounts" section for additional guidance. Gifts or donations made directly to a public library are also tax deductible. Any income the library receives directly must be reported to the city because of its responsibility to account for all income (and expenditures) as required by **Iowa Code 384.20**.

## Community Foundations

Iowa Community Foundations are tax-exempt charitable organizations created by and for Iowa communities to encourage citizens to give financially to their communities. Community foundations:

- ❖ Are local organizations with deep roots in the community.
- ❖ Offer personalized service tailored to each individual's charitable and financial interests.
- ❖ Help people invest in the causes they care about.

Grants from the Community Foundation are available to any group within the community and libraries are eligible to apply. Find more information from [Iowa Community Foundations](#) and [Community Foundations](#) on the State Library website.

## Friends of the Library Groups

A **Friends Group** can help raise funds for special library projects. Friends groups are excellent at attracting publicity and encouraging good public relations and good will for a library. A foundation, described above, may act as a Friends Group.

The [United For Libraries](#) website from the American Library Association is a good resource for Friends groups, foundations, and trustees. Some of their material is free; some is behind a paywall requiring paid membership.

## Private Grants

Private foundations, businesses and corporations may award grants to assist local libraries with programs, services or building projects. Many times the grants are from local or regional organizations or businesses that wish to give back to their communities. The [Foundation Directory Online](#) is published yearly and is a source for private grant information.

Find more [Funding Resources](#) on the State Library website.

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***"In my view, investing in public libraries is an investment in the nation's future..."***

Bill Gates



**COUNTY OF POLK**  
**Board of Supervisors**

111 Court Ave, Suite 300  
Des Moines, Iowa 50309-2214  
Ph. 515.286.3120  
Fax. 515.323.5225  
[www.polkcountyiowa.gov](http://www.polkcountyiowa.gov)

Sarah Boese  
Deputy County Administrator  
515.286.3895  
[sarah.boese@polkcountyiowa.gov](mailto:sarah.boese@polkcountyiowa.gov)

June 12, 2023

Bondurant Community Library Board of Trustees  
104 2nd St NE  
PO Box 160  
Bondurant, IA 50035

Dear Board of Trustees,

The current contract that provides Polk County funding to local public libraries expires on June 30, 2023. The updated contract for July 1, 2023 through June 30, 2026 is enclosed. The Polk County Board of Supervisors will approve this contract in August.

Please sign the enclosed contract and return a copy to me by June 30. You can email it to [sarah.boese@polkcountyiowa.gov](mailto:sarah.boese@polkcountyiowa.gov) or mail it to me at:

Sarah Boese  
Polk County Board of Supervisors  
111 Court Ave, Suite 300  
Des Moines, Iowa 50309

Thank you and please feel free to call me with any questions at 515-286-3895.

Sincerely,

Sarah Boese, Deputy County Administrator  
Polk County Board of Supervisors

AGREEMENT  
FOR LIBRARY SERVICES TO RURAL POLK COUNTY

THIS AGREEMENT made and entered into the \_\_\_ day of \_\_\_\_\_, 2023, by and between Polk County, a governmental subdivision of the State of Iowa, hereinafter the "County", and, jointly and severally, the members of the Polk County Library Association, hereinafter the "Provider Libraries," a partnership of the Boards of Trustees of the public libraries of the incorporated cities of Altoona, Ankeny (Kirkendall Public Library), Bondurant (Community Library), Carlisle, Clive, Des Moines, Grimes, Johnston, Mitchellville, Pleasant Hill, Polk City (Community Library), Runnells, and Urbandale.

WITNESSETH:

WHEREAS, the Provider Libraries are qualified public libraries which are supported financially by annual appropriations from the respective city councils of the cities of Altoona, Ankeny, Bondurant, Carlisle, Clive, Des Moines, Grimes, Johnston, Mitchellville, Pleasant Hill, Polk City, Runnells, and Urbandale; and

WHEREAS, this Agreement provides that the County may contract with the Provider Libraries for library services at the rate and in the manner set out in this Library Services to Rural Polk County Agreement and that the citizens of each of the participating parties may have full access to and use of all library facilities of each of the Provider Libraries;

NOW THEREFORE, the "Provider Libraries" and the "County" do hereby agree as follows:

1. Purpose of Agreement

This 28E Agreement is made by and between the parties pursuant to the provisions of Chapter 28E and Chapter 392.5, Code of Iowa 2013, as amended, whereby the Provider Libraries enter into the Library Services to Rural Polk County Agreement to jointly provide library services to the residents of their respective cities and to rural Polk County residents as the "County" shall contract with the Provider Libraries. The purpose of this Agreement shall be to set both the terms and conditions under which the Provider Libraries shall jointly share library facilities and provide library services to rural Polk County residents.

2. Agreement Creates No Separate Legal Entity.

No separate legal or administrative entity is hereby created. The Provider Libraries shall jointly perform the responsibilities set out in this Agreement.

### 3. Definitions.

For purposes of this Agreement, the following terms shall have the following meanings:

- (a) "Fiscal year" shall mean the period from July 1 of a year to and including June 30 of the following year.
- (b) "Qualified public libraries" mean libraries or library systems which are all or partially in Polk County and which meet the average service level of the provider libraries in the following categories: 1) total per capita library expenditures, 2) total library collection volumes, 3) total full-time professional library staff per 1,000 citizens, and 4) total library open hours per week.
- (c) "Library services to rural Polk County residents" may include the same materials and services that Provider Libraries extend to the residents of their own individual cities.

### 4. Procurement of and payment for Library Services to Rural Polk County residents.

The County hereby contracts to procure and agrees to accept rural library services for and on behalf of its citizens, such services to be provided upon the terms and conditions set forth and provided in this Agreement. In consideration of the provision of rural library services by the Provider Libraries, the County agrees to pay an annual aggregate amount for rural library services, such amount to be paid in four equal quarterly payments to each of the Provider Libraries, all as hereafter provided. The County agrees to pay each year an annual aggregate amount according to the following formula.

#### Percentage of Usage

The County's usage of each Provider Library (represented by the number of items circulated to County's rural residents in the prior fiscal year) shall be determined by dividing that figure by the sum of all Provider Libraries' total usage (represented by all the items circulated by all Provider Libraries in the prior fiscal year). This results in a number that shows the usage by the County's rural residents as a percentage of all Provider Libraries' total usage.

#### Total Operating Expenses

Each Provider Library shall report its total operating expenses for the prior fiscal year. The operating expenses do not include debt service, capital expenditures or other items not associated with the operational budget of each Provider Library.

#### Payment Calculated as Usage Multiplied by Percentage of Operating Expenses

The County will pay the amount calculated by multiplying the percentage of usage for each Provider Library by the total of all Provider Libraries' operating expenses with the total amount not to exceed the following annual amounts:

Fiscal Year 23/24: \$650,000

Fiscal Year 24/25: \$650,000

Fiscal Year 25/26: \$650,000

See Exhibit 1 for the formula example for FY 23/24- FY25/26.

#### 5. Annual Aggregate Amount to be Billed Quarterly

Pursuant to this Agreement, the County will be notified of its annual contribution, along with a table showing circulation, budget, etc, from each Qualified Public Library, by the President of the Polk County Library Association following the end of the fiscal year. The County will then distribute payments to the Provider Libraries on a quarterly basis. Each such quarterly payment will be for an amount equal to twenty-five percent (25%) of the aggregate annual amount owed by the County for that fiscal year, which payment amount shall hereafter be referred as the aggregate quarterly payment. Quarterly payments will be mailed not later than the last working day of October, January, April, and July for library services provided in the preceding calendar quarter.

#### 6. Provision of Rural Library Services by Provider Libraries.

In providing such library services to the County's rural residents, the Provider Libraries hereby agree to comply with all the requirements and provisions set out in the Library Services to Rural Polk County Agreement. The Provider Libraries further agree that the residents of the County may have the same right of access to and use of the library facilities of the Provider Libraries' residents of the cities whose libraries are the parties to the Library Services to Rural Polk County Agreement; that is, the rural residents of the County may have full access to and use of all library facilities of the cities of Altoona, Ankeny, Bondurant, Carlisle, Clive, Des Moines, Grimes, Johnston, Mitchellville, Pleasant Hill, Polk City, Runnells, and Urbandale, provided the County is in full compliance with terms of this Agreement. Additionally, the Provider Libraries agree to provide at least 60 days' notice to the County of any proposed changes that would limit rural residents right of access to and use of library facilities or that would provide rural residents with a lesser service level than is provided or a higher fee structure than is charged to residents of the cities whose libraries are the parties to the Library Services to Rural Polk County Agreement.

#### 7. Term of Agreement.

The term of this Agreement shall be from July 1, 2023 until June 30, 2026.

#### 8. Termination of Agreement for Rural Library Services.

Either Party may terminate its participation in this Library Services to Rural Polk County Agreement as of July 1<sup>st</sup> of any calendar year, provided written notice of intent to cancel such participation is sent by certified mail to the President of the Polk County Library Association or to the Polk County Board of Supervisors. Such notice of intent to cancel participation shall be postmarked not less than six (6) months prior to the July 1<sup>st</sup> date upon which either party desires to cancel service.

#### 9. Participation in Library Board Meetings of Provider Libraries.

The County may designate and send an observing member to meet with and to participate in library board meetings of any Provider Library providing library services under this Agreement. Said observing member will be provided copies of the agendas of all library board meetings of each Provider Library. An observing member wishing to have an item considered by a library board shall notify that library's director in advance of the preparation of that board's agenda.

**10. Agreement to be Filed with Secretary of State.**

This Agreement shall be filed with the Secretary of State and recorded with the Polk County Recorder pursuant to Chapter 28E.8, Code of Iowa.

**IN WITNESS WHEREOF**, this Agreement has been executed in fifteen (15) counterparts, each of which may be considered an original, on the day and year last above written.

Rural Polk County Library Funding Formula for FY 23/24

<b>Provider</b>	<b>Rural Polk County Usage in FY 21/22</b>	<b>Total Usage (circulation to all users) in FY 21/22</b>	<b>% of Total Usage</b>	<b>Total Operating Expenses in FY 21/22</b>	<b>Prorated Cost to Polk County</b>
<b>Altoona Public Library</b>	16,973	130,880	0.5244%	\$ 1,132,131	\$ 123,589
<b>Bondurant Public Library</b>	10,623	62,539	0.3282%	\$492,222	\$ 77,352
<b>Carlisle Public Library</b>	1,467	35,425	0.0453%	\$ 276,608	\$ 10,682
<b>Clive Public Library</b>	690	183,534	0.0213%	\$ 826,774	\$ 5,024
<b>Des Moines Public Library</b>	12,341	1,302,598	0.3813%	\$ 10,193,697	\$ 89,861
<b>Grimes Public Library</b>	5,974	128,085	0.1846%	\$ 814,989	\$ 43,500
<b>Johnston Public Library</b>	8,341	247,111	0.2577%	\$1,514,948	\$ 60,735
<b>Kirkendall Public Library (Ankeny)</b>	22,115	577,123	0.6832%	\$ 2,379,278	\$ 161,031
<b>Mitchellville Public Library</b>	102	16,657	0.0032%	\$ 117,017	\$ 743
<b>Pleasant Hill Public Library</b>	5,201	61,152	0.1607%	\$ 708,862	\$ 37,871



<b>Polk City Public Library</b>	3,167	43,172	0.0978%	\$ 350,149	\$ 23,061
<b>Runnells Public Library</b>	644	2,069	0.0199%	\$ 18,248	\$ 4,689
<b>Urbandale Public Library</b>	1,629	446,420	0.0503%	\$2,272,546	\$ 11,862
<b>Polk County Contract</b>					
<b>Libraries</b>	89,267	3,236,765	2.7579%	\$ 21,097,469	\$ 650,000
<b>Contract Maximum for FY 23/24</b>					\$ 650,000

**POLK COUNTY, IOWA**

ATTEST:

\_\_\_\_\_  
Jamie Fitzgerald, County Auditor

\_\_\_\_\_  
Tom Hockensmith, Chair

STATE OF IOWA            )  
  ) SS  
COUNTY OF POLK        )

On this \_\_\_\_\_ day of \_\_\_\_\_, 2023, before me a Notary Public in and for said State, personally appeared Tom Hockensmith and Jamie Fitzgerald, to me personally known, who being duly sworn, did say that they are the Chair of the Board of Supervisors and County Auditor, respectively, of Polk County, Iowa, a political subdivision of the State, created and existing under the laws of the State of Iowa, and that the seal affixed to the foregoing instrument is the seal of said County, and that said instrument was signed and sealed on behalf of said County by authority and resolution of its Board of Supervisors, and said Chair and County Auditor acknowledged said instrument to be the free act and deed of said County by it voluntarily executed.

\_\_\_\_\_  
Notary Public in and for the State of Iowa

Bondurant Community Library Board of Trustees

By: \_\_\_\_\_

President, Board of Trustees

By: \_\_\_\_\_

Secretary, Board of Trustees

STATE OF IOWA, POLK COUNTY, ss:

On this \_\_\_ day of \_\_\_\_\_, 2023, before me the undersigned, a Notary Public in and for said State, personally appeared \_\_\_\_\_ and \_\_\_\_\_, to me personally known, who being by me duly sworn, did say that they are President and Secretary, respectively, of the Bondurant Community Library Board of Trustees; that the foregoing document was signed and executed upon behalf of such Board of Trustees by authority of said Board granted at its meeting of \_\_\_\_\_, and that \_\_\_\_\_ and \_\_\_\_\_ acknowledged the execution of the document to be their voluntary act and deed and the voluntary act and deed of said Board of Trustees, by it voluntarily executed.

\_\_\_\_\_  
Notary Public in and for said State of Iowa

- City of Altoona, Iowa
- Kirkendall Library Board of Trustees
- Carlisle Public Library Board of Trustees
- City of Clive, Iowa
- Des Moines Public Library Board of Trustees
- Grimes Public Library Board of Trustees
- Johnston Public Library Board of Trustees
- Mitchellville Public Library Board of Trustees
- Pleasant Hill Public Library Board of Trustees
- Polk City Community Library Board of Trustees
- Runnells Community Library Board of Trustees
- Urbandale Public Library Board of Trustees

# BONDURANT COMMUNITY LIBRARY

## PATRON BEHAVIOR POLICY



All persons have free access to the Bondurant Community Library, its facilities and services during its regular business hours. Children under nine years of age must be accompanied in library facilities by a parent, guardian, or other responsible person. Bondurant Community Library assumes no responsibility for unattended minors. Refer to the unattended children policy.

Section 392.5 of the Code of Iowa delegates to Library Board of Trustees the right to establish the rules and regulations for use of the library.

The Bondurant Community Library Board Policy prohibits conduct in the Library that:

- a) Interferes with the rights of individuals to use library materials and services
- b) Interferes with the ability of library staff to conduct library business, or
- c) Threatens the secure and comfortable environment of the Library.

Any person who fails to comply with the following rules and regulations of the Bondurant Community Library may lose loan privileges and/or be removed from the facility. Nothing in these regulations shall be deemed to preclude other civil or criminal action as applicable. In some situations, if the behavior is extreme, no warning is necessary, and the proper authorities will be called.

These rules and regulations shall apply to all persons in their use of library facilities. In order to ensure an atmosphere of safety and respect, the Library prohibits behavior, which may include but is not limited to the following:

- Interfering with another person's enjoyment of library services and facilities.
- Speaking, shouting, or raising one's voice to cause a disturbance to other persons in the facility.

- Removing library materials, or hiding library materials with intent to remove such materials, without properly charging out or borrowing such material. (Iowa Code 702.22, 714.5, 808.12).
- Misusing the library's computers or the computer system, network, or library data. No food or drink near computer stations.
- Sleeping on the library premise, depositing bedrolls, or bedding on library property. Bringing luggage or large bags into the library. Leaving personal items in the building. Library assumes no responsibility for any belongings left unattended.
- Using restrooms for bathing or other personal grooming.
- No tobacco products are allowed inside of the library facilities, or consumption of alcoholic beverages, or use of illegal substances. All are strictly prohibited in the Library.
- Operating, pushing, or riding wheeled devices within library facilities. No skateboarding anywhere on library property. The use of baby strollers, equipment required by persons with disabilities, and equipment used by library personnel is permitted.
- Depositing litter anywhere other than in garbage receptacles provided.
- Spitting on any person or library furniture, floors, or materials.
- Posting, distributing, or circulating any handbill, circular, card, booklet, placard without the permission of the library director or his or her designee.
- Cell phone users must respect the wishes of others who desire a quiet location for study by changing the setting on their devices to a non-audible signal. If your connection is bad, do not raise your voice, please move to the lobby or outside of the building.
- Bringing ~~weapons, firearms, or~~ explosive devices into the library.
- Using offensive language toward staff members or other patrons.
- Making inappropriate sexual or other harassing and/or discriminatory comments toward staff or other patrons.
- Picture taking or videotaping of people except at Library sponsored events or programs unless authorized by the people involved or their parents if minors are present.
- Entering the non-public or locked areas, unless accompanied by a staff member or through prior authorization from a staff member.

- Maintaining bodily hygiene, which is so offensive as to constitute a nuisance to other persons.
- Behaving in a disorderly, loud or boisterous manner not caused by a disability.
- Willfully annoying, harassing, or threatening another person or library staff.
- Animals, with the sole exception of animal aids for the disabled, are prohibited.
- Shirts and shoes must be worn in the building.
- No campaigning, petitioning, interviewing, survey taking, soliciting, sales, or any other speech or conduct, which results in the disruption of library activities, will be allowed within the library or on the library grounds. This does not refer to any library-sponsored activities.

## Enforcement

Enforcement of these rules for persons age nine and over may take the form of any of the following actions, depending on the severity of the misconduct, which will be determined by the staff on duty at the time.

In the case of minor disruption, the patron receives two warnings. At the third offense, the patron must leave the library for the rest of the day. Parents of children under 18 may be called as appropriate.

In the case of extreme misconduct the offender may receive only one warning or be ordered to leave the building immediately. The police or parents may be called as appropriate.

The Director or designee will warn patrons causing disruption on repeated visits that they will not be allowed to enter the building if the behavior continues. If a correction is not made, patron will be barred from the library for one month. If library privileges are reinstated and the disturbance recurs, the patrons may be barred from the library for longer periods.

For children under age nine, a staff member will issue two warnings to the child and then inform parent/caretaker that the child is behaving in a disruptive

manner. If the parent/caretaker refuses or is unable to control the child, they will be asked to leave with the child. If the parent/caretaker has not been located within an hour, is uncooperative, or if the library is closing, the police will be called to assume responsibility for the child. Children are subject to all of the above guidelines and may be banned from the library.

These guidelines are designed to make your library visit safe, productive and pleasant.

Adopted by the Bondurant Community Library Board of Trustees

12/05/2002

Reviewed and Revised

03/2007, 6/2015, 2/2019, 1/2021

## Addendum:

### **702.22 Library materials and equipment.**

1. "*Library materials*" include books, plates, pictures, photographs, engravings, paintings, drawings, maps, newspapers, magazines, pamphlets, broadsides, manuscripts, documents, letters, public records, microforms, sound recordings, audiovisual materials in any format, magnetic or other tapes, electronic data processing records, artifacts, and written or printed materials regardless of physical form or characteristics, belonging to, on loan to, or otherwise in the custody of any of the following:

- a. A public library.
- b. A library of an educational, historical, or eleemosynary institution, organization, or society.
- c. A museum.
- d. A repository of public records.

2. "*Library equipment*" includes audio, visual, or audiovisual machines, machinery or equipment belonging to, on loan to or otherwise in the custody of one of the institutions or agencies listed in subsection 1.

### **714.5 Library materials and equipment - unpurchased merchandise - evidence of intention.**

The fact that a person has concealed library materials or equipment as defined in section 702.22 or unpurchased property of a store or other mercantile establishment, either on the premises or outside the premises, is material evidence of intent to deprive the owner, and the finding of library materials or equipment or unpurchased property concealed upon the person or among the belongings of the person, is material evidence of intent to deprive and, if the person conceals or causes to be concealed library materials or equipment or unpurchased property, upon the person or among the belongings of another, the finding of the concealed materials, equipment or property is also material evidence of intent to deprive on the part of the person concealing the library materials, equipment or goods.

The fact that a person fails to return library materials for two months or more after the date the person agreed to return the library materials, or fails to return library equipment for one month or more after the date the person agreed to return the library equipment, is evidence of intent to deprive the owner. Provided a reasonable attempt, has been made to reclaim the materials or equipment, including the mailing by restricted certified mail of notice, that such material or equipment is overdue and criminal actions will be taken. Notices stating the provisions of this section and of section 808.12 with regard to library materials or equipment shall be posted in clear public view in all public libraries, in all libraries of educational, historical or charitable institutions, organizations or societies, in all museums and in all repositories of public records. After the expiration of three days following the due date, the owner of borrowed library equipment may request the assistance of a dispute resolution center, mediation center or appropriate law enforcement agency in recovering the equipment from the borrower.

The owner of library equipment may require deposits by borrowers and in the case of late returns, the owner may impose graduated penalties of up to twenty-five percent of the value of the equipment, based upon the lateness of the return.

In the case of lost library materials or equipment, arrangements may be made to make a monetary settlement.

### **808.12 Detention and search in theft of library materials and shoplifting.**

1. Persons concealing property as set forth in section 7 1 4.5, may be detained and searched by a peace officer, person employed in a facility containing library materials, merchant, or merchant's employee, provided that the detention is for a reasonable length of time and that the search is conducted in a reasonable manner by a person of the same sex and according to subsection 2 of this section.



2. No search of the person under this section shall be conducted by any person other than someone acting under the direction of a peace officer except where permission of the one to be searched has first been obtained.

3. The detention or search under this section by a peace officer, person employed in a facility containing library materials, merchant, or merchant's employee does not render the person liable, in a criminal or civil action, for false arrest or false imprisonment provided the person conducting the search or detention had reasonable grounds to believe the person detained or searched had concealed or was attempting to conceal property as set forth in section 714.5.

[C62, 66, 71, 73, 75, 77, §709.22 - 709.24; C79, 81, §808.12]

BONDURANT COMMUNITY LIBRARY	BOARD
POLICY SECTION	APPROVED 09/2005
<b>INCIDENT REPORT POLICY &amp; FORM</b>	REVISED

### **INCIDENT REPORT POLICY**

The Library Director will keep a confidential file of information on problem incidents in which a CONTACT form has been filed. The purpose of this file is to track any serious problems that are reported by the staff. It will be used to document incidents and to track problems of a reoccurring nature.

#### **CONTACT FORM**

Please provide a description of unacceptable behavior reported and a description of any action taken (e.g., person asked to leave and did so; police called; officer escorted person from the library, etc.)

**NAME** \_\_\_\_\_

**ADDRESS** \_\_\_\_\_

**DATE & TIME OF INCIDENT** \_\_\_\_\_

**DESCRIPTION OF INCIDENT:**

**REPORTED BY** \_\_\_\_\_

**WITNESSES** \_\_\_\_\_

**ACTION TAKEN:**

Submit contact form to Library Director.  
Director initial when received & read.