

Directors Report – January 16th 2020

Building and Grounds

- Curbs destroyed by plows...again. DPW Director suggests eventual install of granite curbing
- Review of spreadsheet

Monthly Successes

- Automatic renewals begin network wide
- Kindergarten Card Initiative complete, large improvements since the pilot program
- Information Sessions in Dec/Jan went well, more advertising needed for increased turnout
- Emily Reardon and Elvis The Reading Dog Return!
- Mr. Vinny's Shadow Puppet Show
- Over 1000 items donated to Food Pantry from the Library for the holidays.

General Update

- Expanded Budget Narrative Complete
- Capital Budget Requests not included in Administrators recommendation, meeting with CBC to follow
- Department Heads trying out various calendar software to streamline schedule and time off management
- Community Outreach Librarian search nearing completion
- Library Director to attend Public Library Association Annual Conference in February

Current Fiscal Year Data Comparison

Key Performance Indicators

	Last Year												
	Current month	Month comparison	Nov 2019	Oct 2019	Sep 2019	Aug 2019	Jul 2019	Jun 2019	May 2019	Apr 2019	Mar 2019	Feb 2019	Jan 2019
Circulation - Total	48,897	46,821	49,042	51,663	51,049	54,942	56,736	53,701	51,937	51,999	54,694	48,446	52,558
Circulation - Adult (books/magazines)	9,527	9,713	9,059	10,019	9,642	10,283	10,747	9,829	10,278	10,180	10,734	9,430	10,620
Circulation - YA print (books/magazines)	1,753	1,504	1,906	1,747	1,886	2,545	2,854	2,521	1,600	1,355	1,729	1,442	1,515
Circulation - Children's print (books/magazines)	16,790	15,778	18,635	19,424	19,245	19,518	21,719	19,370	19,119	19,633	21,921	18,344	18,949
Circulation - Adult Audio Visual	8,238	8,803	7,257	7,469	6,800	7,581	7,795	5,886	8,012	7,947	6,486	7,621	8,817
Circulation - YA Audio Visual	52	68	41	23	35	52	64	69	39	48	48	44	47
Circulation - Children's Audio Visual	1,979	1,886	1,848	1,856	1,832	2,229	2,096	2,047	1,903	2,071	2,049	1,861	2,061
Circulation - downloads & streams (eBooks/eAudiobooks/eMaterials)	10,374	8,776	10,102	10,896	11,365	12,515	11,208	11,921	10,789	10,538	9,779	9,391	10,212
Reference Questions	1,292	2,109	1,482	1,720	1,471	2,126	2,163	1,830	1,854	1,895	2,022	2,056	2,218
Programs Offered (total)	63	55	70	79	58	59	64	59	82	71	81	61	77
Adult Programs	19	20	24	23	22	20	19	23	31	25	28	21	21
YA Programs	9	7	9	11	5	12	11	13	10	6	9	11	13
Children's Programs	35	28	37	45	31	27	34	23	41	40	44	29	43
Programs Attendance (total)	1,179	1,242	1,435	2,062	1,358	1,154	1,761	1,365	1,837	1,942	1,852	1,507	1,740
Adult Programs Attendance	151	158	324	274	218	250	125	295	396	379	359	273	198
YA Programs Attendance	43	55	39	71	43	120	88	135	101	41	69	121	108
Children's Programs Attendance	985	1,029	1,072	1,717	1,097	784	1,548	935	1,340	1,522	1,424	1,113	1,434
Meeting Room Use	84	72	89	96	75	70	73	75	101	92	100	75	97
Museum Pass Use	164	188	173	157	144	277	262	265	198	228	197	203	205
Use of Library Computers	2,309	1,454	1,590	1,764	1,652	1,774	1,694	1,666	1,785	1,776	1,827	1,241	1,536



Current Fiscal Year Data Comparison

Key Performance Indicators

	FY19	FY18	FY17	FY16	FY15
	Total Annual	Total Annual	Total Annual	Total Annual	Total Annual
Circulation - Total	599,254	548,782	562,579	557,469	536,824
Circulation - Adult (books/magazines)	120,223	118,589	121,002	124,061	120,027
Circulation - YA print (books/magazines)	21,572	23,095	23,424	21,516	20,486
Circulation - Children's print (books/magazines)	219,135	225,480	233,689	226,867	219,182
Circulation - Adult Audio Visual	90,878	102,538	108,748	110,921	106,847
Circulation - YA Audio Visual	612	733	870	894	1,029
Circulation - Children's Audio Visual	23,354	28,360	33,572	36,809	43,901
Circulation - downloads (eBooks/eAudiobooks)	116,660	46,351	38,552	34,639	24,441
Reference Questions	29,754	39,004	36,646	37,526	34,883
Programs Offered (total)	772	681	645	566	495
Adult Programs	278	246	156	139	101
YA Programs	115	107	117	91	55
Children's Programs	379	328	372	336	339
Programs Attendance (total)	18,084	17,700	19,186	16,620	14,012
Adult Programs Attendance	3,353	3,721	3,061	2,517	940
YA Programs Attendance	1,052	1,181	1,900	1,213	799
Children's Programs Attendance	13,679	12,798	14,225	12,890	12,273
Meeting Room Use	941	878	855	781	695
Museum Pass Use	2,531	2,477	2,525	2,592	2,473
Use of Library Computers	18,418	20,473	21,116	22,343	21,019

Patron Traffic

Month: December 2019

	Main Entrance	Childrens Room	Assembly Room	Daily Total
1	606	759	190	1,555
2	285	312	69	666
3	322	596	415	1,333
4	150	279	138	567
5	530	748	408	1,686
6	515	651	240	1,406
7	333	517	358	1,208
8	616	803	211	1,630
9	295	407	75	777
10	456	648	237	1,341
11	523	704	192	1,419
12	618	733	231	1,582
13	554	550	166	1,270
14	459	608	204	1,271
15	458	789	251	1,498
16	298	383	82	763
17	507	625	171	1,303
18	338	456	173	967
19	503	716	164	1,383
20	515	583	199	1,297
21	962	1,208	250	2,420
22				
23	296	325	61	682
24	532	645	156	1,333
25	Christmas	Day	Closed	
26	237	162	47	446
27				
28	1,076	1,255	458	2,789
29	504	588	158	1,250
30	301	289	67	657
31	344	603	137	1,084

Closed @ 7:30p

Open @ 10am

Monthly total

35,583

		ORIG./ADJ. APPROPRPTS.	TRANSFER	ADJUSTED BUDGET	SPENT DEC	SPENT JULY - DEC	BALANCE	PROJECTED 6 MONTHS	% EXP
	LIBRARY PUBLIC SERVICE								
16121									
511000	WAGES, FULL TIME	807,237.00		807,237.00	76,403.38	385,572.20	421,664.80	403,618.50	47.8%
511100	WAGES, PART TIME	247,707.98		247,707.98	19,657.75	100,337.33	147,370.65	123,853.99	40.5%
513000	OVERTIME	10,000.00		10,000.00	783.80	5,230.88	4,769.12	5,000.00	52.3%
514800	LONGEVITY	6,721.00		6,721.00	5,208.93	5,208.93	1,512.07	3,360.50	77.5%
16122									
530000	PROFESSIONAL SERVICES	1,976.00		1,976.00	0.00	569.54	1,406.46	988.00	28.82%
534100	TELEPHONE	9,053.00		9,053.00	328.81	1,641.24	7,411.76	4,526.50	18.1%
552900	BOOKS/PER/FILM/CD/REC	356,843.52		356,843.52	26,106.53	149,953.28	206,890.24	178,421.76	42.0%
573000	DUES	1,020.00		1,020.00	0.00	0.00	1,020.00	510.00	0.0%
	TOTAL LIB PUBLIC SVC	1,440,558.50	0.00	1,440,558.50	128,489.20	648,513.40	792,045.10	720,279.25	45.0%
	LIBRARY TECHNICAL SERVICES								
16131									
511000	SALARIES, FULL TIME	175,395.00		175,395.00	16,586.06	84,046.31	91,348.69	87,697.50	47.9%
511100	SALARIES, PART TIME	12,736.00		12,736.00	1,550.90	8,346.29	4,389.71	6,368.00	65.5%
514800	LONGEVITY	2,825.00		2,825.00	2,150.00	2,150.00	675.00	1,412.50	76.1%
16132									
530600	COMPUTER SERVICE	76,994.00		76,994.00	263.69	63,188.24	13,805.76	38,497.00	82.1%
542200	PROCESSING SUPPLIES	12,740.00		12,740.00	815.35	6,477.63	6,262.37	6,370.00	50.8%
573000	DUES	0.00		0.00	0.00	0.00	0.00	0.00	#DIV/0!
	TOTAL LIBRARY TECHNICAL S	280,690.00	0.00	280,690.00	21,366.00	164,208.47	116,481.53	140,345.00	2.97%
	LIBRARY CAPITAL								
16133									
587100	CAPITAL COMPUTER	12,500.00		12,500.00	0.00	0.00	12,500.00	6,250.00	0.0%
	TOTAL LIBRARY DEPT.	2,263,104.22	0.00	2,263,104.22	181,933.49	993,205.38	1,269,898.84	1,131,552.11	43.9%

1/16/2019	1/16/2020	Work Orders Currently in Process							
Ticket Number	Date of Creation	Today	Days Open	Date Closed	Issue	Description	Status		
#22024	3/10/2017	1/16/2020	1042		Cement slab	A cement slab has fallen off of the front of the building below the front fencing under the windows near the bushes. It's costly to replace, but is only asctetics.	No Update.		
#30363	7/26/2018	1/16/2020	539		East Wing Entrance Not Level	Landing is not level with doorway, trip hazard	DPW has responded that they are unable to assist with this request. Facilities Director has commented that he hopes to assist with this need when similar work is done in other buildings.		
#31506	9/12/2018	1/16/2020	491		Air Conditioner components frozen in blocks of ice	Unit had large ice blockage and running water behind it could be heard, was running into the ceiling and dripping into public spaces below (reference room)	CBC has approved funding. Facilities Department assembling quotes now and will move forward with replacement of this unit.		
#37524	9/13/2019	1/16/2020	125		Water Fountain Leaking	Water Fountain on main floor leaks	Has been adjusted twice by Library Director, now seeking a plumber as a more permanent repair is needed.		
#40632	11/22/2019	1/16/2020	55		Children's Side Door Not Closing	Not working.	To be reset during the spring, a work around is in place that will work until warmer weather when the door can be removed.		
#40664	11/25/2019	1/16/2020	52		Japanese Knotweed	Weeds need to be removed	Facilities Director explained it is not something they can take on, not enough resources.		
#41075	12/17/2019	1/16/2020	30		Handicap Paddles	Not working. Many repairs over time, many this year.	Paddles need to be evaluated and possibly replaced.		
#41077	12/17/2019	1/16/2020	30		Children's Door not closing	Outside door will not close all the way without force.	Have talked to two vendors who both blame each other. Have now asked the Facilities Director to review.		
#41099	12/18/2019	1/16/2020	29		Fax Line Needs Relocating	Fax Line is in the way of staff and must be relocated	Awaiting electricians availability		
#41547	1/14/2020	1/16/2020	2		Sink in Tech Services Leaking	Sink is dripping underneath the sink. Repair and replacement of plank needed.	New work order.		
					Other Facilities Projects				
					Capital Projects				
	7/1/2016	5/11/2018	679	FY17	Library Envelope Upgrade	New insulation, lights, and ceiling to be installed for energy efficiency in East and West Wings of Main Floor.	Project Complete		
	7/1/2017	1/24/2019	572	FY18	Gutter replacement	Replacement of Gutters - Front only	Gutter Replacement Complete - Front only, additional sides being considered for a FY20 Capital Project		
	7/1/2017	10/23/2019	844	FY18	Light replacement	New Facilities Director is evaluating old agreement and plans to adjust. Project targeted for summer	Project now in process (1 day a week by Town Electrician, no cost for labor)		
						New Facilities Director is evaluating old agreement and plans to adjust. Project targeted for summer	It's been determined by the Facilities Director that the funding from Capital Budget Committee is not enough to complete this project due to the required design elements that would be needed.		
	7/1/2017	3/21/2019	628	FY18	Quiet study room		DPW has replaced broken curbing (11/16/18). They will look to crack seal fill in the spring		
	7/1/2017	12/13/2018	530	FY18	Parking lot work	Curbs have been replaced	Project Complete		
	7/1/2018	2/4/2019	218	FY19	Automatic Door Locks	Installing of timed door locks on public entrances.			
	7/1/2019	10/23/2019	114	FY20	3rd Floor Air Conditioner	Needs to be purchased and replaced.	Facilities has schedule this work for February 18th 2020		
	7/1/2019	10/23/2019	114	FY20	Gutter replacement	Replacement of Remaining Gutters	Process to be managed by Town Facilities Department		

1/16/2020

Outline for 2020

January

- 2nd and 3rd Budget request from Town for detailed outlook
- Review Board of Library Trustees Gift Program
- Annual Report writing
- BCAA Chinese New Year Celebration Fair
- Creation of 2020 Outline

February

- Budget Review Continues with additional committees
- Union Negotiations beginning
- Library plans for Comicon Programming in March

March

- Budget Review Continues with additional committees
- Preparation for Town Meeting (check due dates for warrant articles / updates)
- Policy Review - Ads and Informational Material in the Library
- ITAC Rep Check In

April

- Forming of Long Range Planning Committee begins
- Forming of One Book One Belmont Committee begins
- Annual Election (Two Trustees each year)
- Annual Trustees meeting – Vote new officers
- Friends Annual meeting

May

- Town Meeting Segment A Dates - all at Belmont Highschool: May 4th, 6th, 11th, 13th
- Policy Review - Exhibit and Display Policy
- Selectmen Liaison Check In
- Annual Town Meeting (Warrants)
 - Update from Library if needed

June

- Town Meeting Segment B Dates – All at Chenery Middle School: May 27th, June 1st, 3rd, 8th
- Long Range Planning Committee meetings begin

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- Annual Town Meeting (Financials)
- ITAC Rep Check In
- Summer Reading Program begins

July

- Policy Review – Food and Drink Policy
- Minuteman Contract – Sign and Submit
- Long Range Planning Committee continues

August

- Long Range Planning Committee meetings conclude / Plan writing begins
- Community Preservation
- Meet Belmont
- ARIS Report due to MBLC

September

- 5th Grader Library Card Process / Kindergarten Family Letters go out
- Policy Review: Internet/Computer Acceptable Use Policy
- Financial Report due to MBLC
- Budget Considerations begin
- ITAC Rep Check In

October

- Optional month for One Book One Belmont
- Review of Long Range Plan Document with Trustee Chair
- Trust Fund Review
- Friends annual book sale
- Financial Report due to MBLC
- Forthcoming FY Budget Due (new as of 2019)

November

- Optional month for One Book One Belmont
- Long Range Plan Document shared with Library Trustees
- Policy Review: Available
- Special Town meeting / Operating Override

1/16/2020

- Holiday hours review for upcoming year
- Budget Narrative work in progress
- Friends annual book sale review

December

- Long Range Plan submitted to Mass Board of Library Commissioners
- Annual Report writing begins
- ITAC Rep Check In

1/16/2020

Inventory of Belmont Public Library Policies

- Ads and Informational Material in the Library – **Approved May 2008***
- Behavior Policy for Patrons – **Amended April 2017**
- Children's Room Technology Policy – **Amended December 2015, January 2017**
- Circulation Policy – **Amended February 2017**
- Collection Policy for Tangible Gifts – **Amended August 2018**
- Exhibit and Display Policy – **Date of creation unknown***
- Food and Drink Policy – **Date of creation unknown***
- Homebound Delivery Policy – **Approved August of 2015**
- Internet/Computer Acceptable Use Policy – **Date of creation unknown***
- Materials Selection Policy – **Approved October 2012***
- Meeting Room Policy – **Date of creation unknown**
- Museum Pass Policy – **Amended 2015**
- Naming Rights Policy – **Adopted November 2018**
- Privacy Policy – **Amended June 2019**
- Special Collections Access Policy – **Adopted January 2018**
- Unattended Children Policy – **Adopted March 2017, Amended March 2019**

For review in January 2020: Trustee Gift Program

For review in March 2020: Ads and Informational Material in the Library

For review in May 2020: Exhibit and Display Policy

For review in July 2020: Food and Drink Policy

For review in September 2020: Internet/Computer Acceptable Use Policy

For review in November 2020: open

Gifts Policy Ashland Public Library

Library Materials:

The Ashland Public Library welcomes gifts of new and used books, audio recordings, DVDs and similar materials. Items will be added to the collection in accordance with the Materials Selection policy of the library. Once donated, items become the property of the Ashland Public Library, and may be given to other libraries, non-profit agencies, the Friends of the Ashland Public Library, sold, traded, or discarded if they are not added to the collection. Donated items will not be returned to the donor and the library will not accept any item that is not an outright gift. The Friends of the Ashland Public Library can acknowledge donated items by receipt but is unable to set fair market or appraisal values. It is recommended that the donor make a list of items donated. If items are being donated to obtain a tax benefit, it is the donor's responsibility to establish fair market value or obtain expert assistance in establishing any value. The library also reserves the right to decide when a gift added to the collection must be withdrawn.

Monetary Gifts:

Monetary gifts, bequests, and memorial or honorary contributions toward materials purchases are welcome. Funds donated will be used to purchase items in accordance with the selection policy of the library. If requested, notification of memorial or honorary contributions will be sent to the family of the person being recognized. Suggestions for subject areas or other areas of interest are welcome and will be followed to the extent possible. However, the library encourages donations without stipulations in order to permit the most flexible use of the donation for the enrichment of the collection.

The library welcomes monetary gifts, bequests, and memorial or honorary contributions for non-materials purchases. Suggestions for use of these funds may accompany the gift and will be followed to the extent possible. However, the library encourages donations without stipulations in order to permit the most flexible use of the funds for the benefit of the library and its patrons.

Miscellaneous Item Gifts:

Acceptance of miscellaneous gifts such as artwork, primary source documents or archival materials, such as private papers, equipment and furniture are subject to the approval of the Board of Trustees or their designee.

The library reserves the right to refuse and/or decide the final disposition of all gifts, including conditions of display, housing and access.



Published on Cary Memorial Library, Lexington, Massachusetts (<https://www.caryllibrary.org>)

[Home](#) > [Policies](#) > Gifts of Artwork Policy

Gifts of Artwork Policy

Due to the enormous responsibility of owning and maintaining collections of art, the Cary Memorial Library does not actively collect in this area. The library will, from time to time, receive offers of art to be added to the library's permanent collection and displayed within the library building. The policy below creates a framework to consider such gifts.

This policy covers two-dimensional and three-dimensional works of art and other objects for display, including but not limited to paintings, photographs, murals, fabric art, murals, works of sculpture, pieces of realia, and objects of historic, literary, or cultural interest.

The Director of Cary Memorial Library is authorized to receive works of art on behalf of the library. To assist in this process, the Director may establish an Art Selection Committee to consider the merits of potential gifts. Recommendations to accept artwork of significant value (in excess of \$5,000) are sent to the Library Board of Trustees for approval.

Art Selection Committee: The committee will be composed of a combination of individuals (no fewer than 3) with expertise in art, and those who know and understand the library environment. The committee will include, professional artists or other members of the arts community, as well at least one member of the Board of Trustees.

Appraisals: The library cannot provide appraisals of gifts it accepts for income tax or other purposes, but will acknowledge acceptance of all gifts.

Conditions of Acceptance: The acceptance of gifts designated for public display on Library property shall be considered with attention to the ongoing cost of display, maintenance, and security, as well as suitability, including location. No guarantee is made that any gift will be permanently displayed or kept by the Library.

The library will only accept gifts of art that are made without restriction. The title of such gifts passes to the Cary Memorial Library. The library cannot be held liable if any item is destroyed, damaged or stolen. Only ordinary care in maintaining the gift can be expected. The library may exercise the option to sell any such gift and use the proceeds for any purpose appropriate to the library's mission.

Approved by the Board of Library Trustees 1.20.2010, updated 10.3.18

Source URL: <https://www.caryllibrary.org/policies/gifts-artwork-policy>

Memorial Hall Library

Gifts and Donations Policy

In general, Memorial Hall Library welcomes gifts of money, books, materials, equipment, art objects, documents, photographs, or property of any kind, which promotes the mission of the Library. The Library reserves the right to decline to accept any gift that the *Board of Trustees*, in its sole discretion, deems to be not in the best interests of the Library to accept.

If a gift is accepted by the Library, the gift shall be final and no restrictions on the Library's ownership, possession, use or disposition of the gift shall be effective other than restrictions approved by the express vote of the *Board of Trustees* and memorialized in writing.

Monetary gifts

The library welcomes gifts of cash or stock. Opportunities for establishing a permanent named fund are available and charitable Trusts can be tailored to meet individual needs. If the gift is used to purchase library materials, library staff will try to accommodate the donor's subject or title preferences. A plate with the donor's name will be affixed to the item purchased, if so desired.

Materials

Gifts of books or other materials in good condition are made to the *Friends of Memorial Hall Library*. Donated material is accepted with the understanding that the items are donated to the *Friends*, and may or may not be added to the collection. Items which are not added to collections may, at the discretion of the *Friends*, be distributed to other libraries and organizations, or otherwise disposed of. (See also the Library's Gifts policy in the MHL Collection Development Manual and Book Donation FAQs on the library's web page.)

Collections

Gift collections will be accepted only by the Director in consultation with the *Board of Trustees*, and with the understanding that the collection may not be kept intact.

Recognition gifts

The Library welcomes monetary gifts for purchase of materials for the collection given in recognition of individuals or organizations. The library staff will choose items which accommodate the donor's subject or title preferences, whenever possible. The names of the donor(s) and those recognized by the gift will be listed on a bookplate affixed to the material, if so desired.

Real estate or other personal property

The Library will accept gifts of real property that either support, or could be sold to support, the mission of the Library. Such offers will be handled by the Director, who in consultation with the *Board of Trustees* will determine the suitability of the gift and the terms of acceptance compatible with the Library's mission and policies, the donor's intent, and applicable laws.

Art & decoration objects

In general, gifts of art objects shall be of local interest to the community, of a professional quality, well executed and in good condition. As with all other gifts, final responsibility for acceptance of a work of art resides with the *Board of Trustees*. Art objects will be accepted only with the donor's full agreement that the Library has the right to handle or oversee the disposition of the gift in the best interests of the institution. Because of the Library's limited display and storage areas and focus on its primary mission as a library and not a museum, potential donors of art & decorative objects are requested to discuss any possible gifts with the Director and *Board of Trustees* in advance. (See also the Library's Permanent Art Collection policy under the policies of MHL section of the web page).

No gifts posing a danger or threat to patrons will be accepted (e. g. metal sculpture with sharp, moving parts). No gifts that require extensive, regular special care, or conservation will be accepted.

Any signage related to a gift must be approved by the *Board of Trustees*.

Landscaping Items, Exterior Ornamentation, Sculpture, and Signs

The acceptance and location of gifts of landscaping items, gifts of exterior ornamentation, sculpture and signs will be made by the Board of Trustees, in conjunction with the Library Director. The major criterion on which the decision will be based is the appropriateness of the offered gifts to the landscaping plan for the building.

Valuation

The Library will provide a timely, written acknowledgment of the receipt of gifts to the donor and, if desired, to a recognized individual or organization. Income tax regulations leave the determination of the gift's monetary value to the donor. Donors wishing to have an appraisal of their gifts done for income tax purposes should do so prior to donation.

Future disposition of gifts

Libraries used extensively by their patrons sustain losses through ordinary wear, theft, and mutilation. Also, resources with obsolete and/or misleading information may be discarded with time. The Library therefore cannot guarantee that any gift will be a permanent part of the collection, furnishings, building, or grounds. Articles may be offered to other Town departments, other libraries, transferred to the Friends, or otherwise removed. The Library is not able to notify donors before disposition of gifts.

Approved by the *Library Board of Trustees*

March 14, 2012

Milton Public Library

Gift and Donation Policy

Policy Statement

The Milton Public Library encourages the interest and involvement of residents and organizations through bequests, trusts and donations of monetary or other tangible assets for Library purposes. It is understood that special gifts and bequests should not take the place of public support, but should enable the Library to provide and enhance the grounds, services and collections in ways not financially possible within the current municipal operating budget.

General Regulations

In general, the Milton Public Library welcomes gifts of money, books and other materials, equipment, works of art, documents, photographs, or property of any kind that promotes the mission of the Library.

The Library reserves the right to refuse any gift that the Board of Library Trustees, in its sole discretion, deems to be not in the best interests of the Milton Public Library to accept.

If a gift is accepted by the Library, the gift shall be final; no restriction on the Library's ownership, possession, use, or disposition of the gift shall be effective other than restrictions approved by the express vote of the Board of Library Trustees.

Definitions

1. **Monetary gifts** - The Library welcomes gifts of cash or other investments. If the gift is used to purchase library materials, Library staff will try to accommodate the donor's subject or title preferences.
2. **Materials** - Gifts of miscellaneous books or other materials in good condition are accepted with the understanding that items which are not added to collections will be disposed of at the discretion of the Library. These items may be given to the Friends of the Milton Library for sale, given to other libraries, or discarded. Books may be added to the circulating collection, or placed in the Local History Collection.
3. **Collections** - Gift collections will be accepted only by the Director in consultation with the Board of Library Trustees and with the understanding that the collection may not be kept intact.
4. **Memorial gifts** - The Library welcomes monetary gifts for the purchase of materials for the grounds, services or collections given in recognition or memory of individuals or organizations. Whenever possible, the Library will choose items which accommodate the donor's preferences. The name(s) of the donor(s) and those recognized by the gift will be listed if so desired. These gifts must support the mission of the Library.

The Board of Library Trustees may provide a list of opportunities for memorial and recognition donations.

5. **Real estate or other personal property** - The Library will accept gifts of real property that either

support or could be sold to support the mission of the Library. Such offers will be handled by the Director, who in consultation with the Board of Library Trustees and Town Counsel will determine the suitability of the gift and the terms of acceptance compatible with the Library's mission and policies, the donor's intent, and applicable laws.

6. **Art and decorative objects** - In general, gifts of art objects shall be of local interest to the community, of a professional quality, well-executed, and in good condition. As with all other gifts, art objects will be accepted only with the donor's full agreement that the Library has the right to handle or dispose of the gift in the best interests of the institution.

Because of the Library's limited display and storage areas and focus on its primary mission as a library and not a museum, potential donors of art and decorative objects are requested to discuss any possible gifts with the Director and Board of Library Trustees.

No gifts posing a danger or threat to patrons will be accepted (e.g., metal sculpture with sharp, moving parts). No gifts that require extensive, regular special care or conservation will be accepted.

7. **Valuation** - The Library will provide a timely, written acknowledgement of the receipt of gifts to the donor and, if desired, to a recognized individual or organization. Income tax regulations leave the determination of the gift's monetary value to the donor. Donors wishing to have an appraisal of their gifts for income tax purposes should have that done prior to donation.
8. **Future disposition of gifts** - Libraries used extensively by their patrons sustain losses through theft, mutilation, and ordinary wear. Resources with obsolete and/or misleading information may be discarded with time. The Library, therefore, cannot guarantee that any gift will be part of the collection or furnishings permanently. Excess articles may be first offered to other Town departments and then discarded.

Approved by the Milton Public Library Board of Trustees, 09/14/15.



Milton Public Library

476 Canton Avenue • Milton, Massachusetts 02186

Telephone (617) 698-5757 • Fax (617) 698-0441

Transfer of Ownership Form

DOCUMENT OF TRANSFER OF OWNERSHIP

I hereby present as an unrestricted gift to the Milton Public Library the materials described below.

Date _____ Name of Donor _____

Address _____ Phone Number _____

Signature of Donor _____

Received by _____

Signature _____

Description of gift:

Please print out and complete. Return to the Milton Public Library.

Milton Public Library, 476 Canton Avenue, Milton, MA 02186 617-898-4950



Philip McNulty
Library Director



Ruthanne Fuller
Mayor

GIFT OF MATERIALS POLICY & TRANSFER OF MATERIALS OWNERSHIP FORM

GIFT OF MATERIALS POLICY

The library selectively accepts gifts of books and other materials for public use. In accepting gifts it is the library's policy that:

- 1) The library does not provide appraisals of gifts. The appraisal of a gift to the library for tax purposes is the responsibility of the donor.
- 2) No conditions may be imposed relating to any gift, without the prior approval of the Board of Library Trustees. The library, in accepting the gift, obtains free and complete legal title to it.
- 3) The library will determine whether or not material should be added to the collection. If, for some reason, it is decided that materials should not become a part of the collection the library reserves the right to dispose of the material in the most advantageous manner possible.

DOCUMENT OF TRANSFER OF OWNERSHIP

I hereby present as an unrestricted gift to the Newton Free Library the materials listed below:

Title/Description of Materials	Creator of Materials	Creation Date	Format/Est. Quantity

Donor's Signature: _____ Date: _____

Donor's Name (please print): _____

Donor's Address: _____

Donor's email Address: _____

Relationship of Donor to owner of Materials:

☐ Self ☐ Relative _____ ☐ Other _____

Received by:

Staff Member's Name & Title: _____

Date: _____

(Approved May 16, 2017)

WELLESLEY FREE LIBRARY GIFT ACCEPTANCE POLICY

INTRODUCTION

The Wellesley Free Library Board of Trustees (the "Trustees") welcomes and appreciates offers of gifts and donations. In accepting or declining any such gift, the Trustees, as a public entity, must always make decisions that are in the best interest of both the Library and the community that it serves. The Trustees make the final decision on acceptance of gifts.

The acceptance of gifts does not constitute or imply endorsement by the Trustees of any service, product or business of the donor. Publicity given to such gifts or donations that implies or conveys endorsement or promotion of the donor's services or products by the Wellesley Free Library (WFL) is strictly forbidden.

This policy has been developed to insure:

- fair and equitable treatment of all gifts and donations to the Wellesley Free Library
- guidance for persons involved in gift solicitation, recording, and management
- equity and fairness for the purpose of donor gift recognition and stewardship
- compliance with IRS regulations, Wellesley Town bylaws and acceptable business practices
- complete and accurate recording of gifts and pledges

These policies apply to all parts of the WFL, including all entities under its auspices such as supporting 501(c)(3) funds or organizations. Examples include the Wellesley Free Library Foundation and the Friends of the Wellesley Free Libraries. These policies will be reviewed regularly to ensure compliance with IRS regulations, general accounting standards, Wellesley Town Bylaws and other guidelines as needed.

GIFT ACCEPTANCE TERMS

Gifts accepted by the Trustees or their designated representatives will be accepted only if they:

- are appropriate to the mission and needs of the Library
- are unrestricted or, if restricted, given in reasonably broad and flexible terms to maximize the usefulness to the Library
- are irrevocable
- impose no undue financial burdens on the Library
- permit the WFL to apply the gift to a related purpose if the designated purpose is no longer practical, necessary, or able to be performed
- have a set term for naming opportunities
- conform to all policies and By-laws of the Town of Wellesley relating to the acceptance of gifts.

GIFT ACCEPTANCE AUTHORITY

The following rules will guide the Trustees and their designees (e.g. Wellesley Free Library Foundation, Friends of the Wellesley Free Libraries):

- All solicitations and fundraising projects must be based on the mission of the WFL, its strategic plan and the Library's overall fundraising priorities.
- The Wellesley Free Library Foundation (the "WFL Foundation") and Friends of the Wellesley Free Libraries (the "Friends") have authority to undertake solicitation of funds on behalf of the Wellesley Free Library provided each group follows the procedures and guidelines as set forth by the Trustees.
- It is the responsibility of representatives from any supporting 501(c)(3) funds or organizations under the auspices of the Library Board of Trustees to bring any specific gift issue to the attention of the Library Director, who shall bring it to the attention of the Trustees and the Director of Development as necessary to assist in resolving the issue.
- The Trustees of the WFL have authority to accept or decline any gift to the Wellesley Free Library.
- No solicitation of funds may be undertaken by any outside or independent party on behalf of the WFL without the prior approval of the Library Trustees.
- Gift records at the WFL will be kept confidential to the extent permitted by law.

PLEDGES

Pledges shall be paid within three years. The Trustees must approve any exceptions to this. See the Wellesley Free Library Naming Policy for additional information on naming considerations/restrictions in exchange for a donation.

GIFT ACCEPTANCE PROCESS

The Trustees may, in their discretion, require written documentation for any gift.

GIFT VALUATION AND VEHICLES

The following represent common vehicles for giving. The Wellesley Free Library does not provide tax, legal or financial advice to donors. The Wellesley Free Library recommends that donors obtain such advice from their own advisors. Additional options will be considered by the Trustees or supporting organizations on an as needed basis.

Publicly Traded Securities: The Trustees will accept marketable securities as outright gifts or payments toward pledges or life income gifts. Such gifts will be valued at the mean market value on the date of the gift, in accordance with IRS regulations. Publicly traded securities will generally be sold on the next business day or the next day the exchange is open.

Tangible Property: Acceptance of specific materials donated to the Library will be at the discretion of the Trustees. The Trustees reserve the right to retain or dispose of any accepted materials, as they deem appropriate. It is the responsibility of the donor to secure independent expert appraisals to establish tax-deductible values for non-monetary gifts. The WFL, as donee,

is not regarded as “independent” by the IRS, and therefore maintains a policy of not paying for appraisals.

Tangible property gifts may be counted toward fundraising goals, but not used as a vehicle for pledge payments.

In-Kind Donation: An in-kind donation, also called gift in-kind, refers to the provision of goods or services to an organization, such as office equipment, computers and software or administrative and financial support. These donations generally fall into one of three categories: direct payment by a donor of bill owed by the organization to a third party, donations of goods or donations of services. The donor is responsible for valuing the in-kind donation.

In-kind gifts may be counted toward fundraising goals, but not used as a vehicle for pledge payments.

Gifts of Insurance: Insurance policies may be gifted if the Library through the WFL Foundation is assigned as irrevocable beneficiary and owner. Such gifts will be counted toward fundraising goals and recognized at full value if the donor is at least 80 years of age. Bequests from donors less than 80 years of age will be recognized for the gift valued according to the donor’s actuarial life expectancy.

Bequests: Newly established bequests to the Library through the WFL Foundation will be counted toward fundraising goals and recognized at full value if the donor is at least 80 years of age. Intended bequests from donors less than 80 years of age will be recognized for the gift valued according to the donor’s actuarial life expectancy.

Endowments: The minimum dollar amount required to establish an endowed fund is \$50,000. Preauthorized endowments and naming opportunities are identified on an ongoing basis and listed in the “Naming Opportunities” maintained by the WFL Foundation.

If the commitment does not reach the specified level and the fund in question is not fully endowed within a three-year period, or if the balance of an endowed fund falls below \$10,000, the fund may become part of a general endowment and used for purposes as close to donor’s intent as possible.

Memorial Funds: Memorial Funds are the summation of several gifts from individuals that are designated for a collective memorial. Gifts received in memory of an individual will be designated as unrestricted and placed in a collective fund unless specified for a restricted purpose.

Exceptions

Exceptions to the policy may be made at the Trustees’ discretion.

Approved: September 9, 2019